SIEBEL eBusiness 7

# FUNDAMENTALS

*VERSION 7.5.3, REV. A*

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# Introduction

This guide provides detailed coverage of the Siebel user interface and how to use it; working with data; locating information with the query and find features; sharing information with other users; and so on. The features presented in this guide appear throughout the Siebel application suite; they are introduced through procedures you can learn and use in your own Siebel application.

It is strongly recommended that you read this guide so that you can make optimal use of your Siebel application, especially if you are new to Siebel software.

## Product Modules and Options

This Siebel Bookshelf contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this Bookshelf. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

# Revision History

*Fundamentals*

## Version 7.5.3, Rev. A

**Table 1. Changes Made in Version 7.5.3, Rev. A**

| Topic | Revision |
|---|---|
| "Screen Tabs" on page 31 | Updated and added illustrations. |
| "Record Navigation Buttons" on page 41 | Added figure to illustrate buttons. |
| "Printing Records" on page 72 | Added a note about using the Web browser's print function. |
| "Using Attachments" on page 75 | Added a note to explain renaming of attachments upon download. |
| "Creating Shortcuts to Siebel Records" on page 116 | Changed topic title from "Dragging and Dropping Shortcuts to Siebel Records." |
| "Exporting Data" on page 121 | Updated screenshot and procedure in this topic. |
| "Adding a Recurring Calendar Activity" on page 136 | Added a cross-reference to a reference table of Repeat Frequency values. |
| "Setting Search Preferences" on page 163 | Added this topic. |

## Version 7.5.3

**Table 2. Changes Made in Version 7.5.3**

| Topic | Revision |
|---|---|
| "Siebel Application Toolbar" on page 29 | Revised for 7.5.3: Updated screenshot and added topic to address new reports button. |
| "Show More and Show Less Buttons" on page 36 | Revised for 7.5.3: Updated this topic and added screenshots. |
| "Horizontal Scroll Bars" on page 36 | New for 7.5.3: Added this topic. |

**Table 2. Changes Made in Version 7.5.3**

| Topic | Revision |
|---|---|
| “Vertical Scroll Bars” on page 40 | Revised for 7.5.3: Updated this topic and screenshot. |
| “Using Attachments” on page 75 | Revised for 7.5.3: Updated this topic. Changed topic name from “Attaching a File to a Record.” |
| “Using the Query Assistant” on page 95 | New for 7.5.3: Added this topic. |
| “Lists” on page 42 | Revised for 7.5.3: Updated this topic and screenshot. |
| “Text Fields” on page 49 | Revised for 7.5.3: Updated this topic and added text editor information. |
| “Field Control Buttons” on page 52 | Revised for 7.5.3: Updated Table 10 to reflect changes to user interface and changes to the select button. |
| “Using Selection Dialog Boxes” on page 55 | Revised for 7.5.3: Updated this topic. |
| “Freezing Columns in a List” on page 80 | New for 7.5.3: Added this topic. |
| “Dragging and Dropping Shortcuts to Siebel Records” | New for 7.5.3: Added this topic. |
| “Exporting Data” on page 121 | Revised for 7.5.3: Updated screenshot in procedure. |
| “Recurring Activity Defaults” on page 131 | Added topic and table. |
| “File Menu” on page 24 | Removed row from Table 4 about synchronizing the calendar as it is no longer supported. |
| “Currency Calculator” on page 53 | Updated Table 11 to reflect currency calculator fields. |
| “Printing Your Calendar” on page 154 | Added a tip. |

## Version 7.5, Rev. A

**Table 3. Changes Made in Version 7.5, Rev. A**

| Topic | Revision |
| --- | --- |
| “QuickStart Agent” | Updated section. Added cross-reference. |
| “Application-Level Menu” | Added Caution note. Added sections and tables describing the commands available in the File menu, Edit menu, and View menu. |
| “History Button” | Added a note further clarifying the behavior of the History list. |
| “Site Map” | Added a note further clarifying the behavior of the Site Map. |
| “Text Fields” | Added a note about entering dates in text fields. |
| “Importing Data” | Updated procedure and added screenshots. |
| “Exporting Data” | Added a note to procedure. |
| “Calendar Activity Fields” | Added this topic. |
| “Changing and Saving a Recurring Activity” | Added this topic. |
| “Drop-Down Lists” | Added information about typing ahead to locate values. |
| “Field Control Buttons” | Removed row about the calendar activity button which is no longer supported. Separated Field Control Buttons topic from Selection Dialog Boxes topic. |
| Attaching a File to a Record | Removed Step 7 from the first procedure as it is no longer necessary. Changed title from Attaching a Document to a Record to Attaching a File to a Record. |
| “Keyboard Shortcuts” | Added shortcuts to the General Navigation category in Table 24. |
| “Query Operators” | Updated guidelines for using the NOT operator in Table 26. |

**Table 3. Changes Made in Version 7.5, Rev. A**

| Topic | Revision |
| --- | --- |
| "Calendar Control" | Added this topic. |
| "Changing the Date" | Updated this topic. |

# 1 Overview

This guide provides you with detailed general instructions on using the functionality that is common to all Siebel applications. This guide will give you a solid understanding of the Siebel application window elements, the navigation, and ways to work with data. You will also learn how to locate the information you need using the search and query functions.

It is important that you understand the fundamental elements of your Siebel application. Knowing these elements will decrease the time you spend learning to use other Siebel applications.

The Siebel 7.5 product line is built around a Web interface. If you are familiar with working on the Web, the look and feel of the user interface will be familiar to you.

When you have logged in to your Siebel application, you can also access *Siebel Online Help*, a convenient source of information. To access *Online Help*, from the application-level menu, choose Help > Contents. *Online Help* is a task-based help system, outlining the most common tasks performed in Siebel eBusiness Applications.

**TIP:** Keyboard shortcuts are available in your Siebel application. For a list of the keyboard shortcuts, see Appendix A, “Keyboard Shortcuts.”

# Getting Started with Your Siebel Application

You access Siebel Web Client using a URL provided by your organization. When you use the URL, a login screen (shown in Figure 1) appears, prompting you to enter a user ID and password. Your system administrator can assist you with this task.


**Figure 1. Login Screen Example**

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**NOTE:** If your organization has set up access to the Sample database, you can familiarize yourself with the Siebel application through the demo version of the system. The demo application automatically logs you in and connects you to the Sample database. You are free to add and delete information in the Sample database while becoming familiar with the application.

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# QuickStart Agent

If you are using Siebel Mobile Web Client, you may want to check the Enable Siebel QuickStart check box when you log in. Checking the Enable Siebel QuickStart check box loads an agent that allows significant improvement in the time it takes to launch the Siebel Mobile Web Client. For more information about using Siebel QuickStart, see *Siebel Web Client Administration Guide*.

# Access and Responsibilities

You will be assigned an employee login on the server with a unique ID and password. The login assigned to you defines your job responsibilities, and the data you need to access to fulfill those responsibilities, at the time when you log in to the application.

*Responsibilities* are defined for you by your system administrator. They determine the collection of *views* you see. For example, if you were a sales manager, you would need views to manage your team's accounts, contacts, and opportunities, but your sales representatives would not need these views.

A *position* is the basis for determining what *data* you can access. It allows you to see certain records but not others. The position represents an assigned job title within an organization. By assigning you a position (job title), the administrator can determine the set of data you should see. For example, the South American VP of Sales would not see the same data as a North American sales representative.

Here are three factors that could determine what records you can see:

- A record can be assigned an owner, meaning that it can be assigned to only one person. Only the owner of the record can see it. This type of record is called a *personally owned record* because only one user can own the record.
- A record can also be assigned to a team. Only the people who have been assigned as team members for the record can see it.
- Companies also distribute records by organization. Users in the South American region of an organization will see only records for South America. Companies with channel partners can also use organizations to partition data, allowing their partners to access only data that they need.

# Web Browser Settings

You may want to adjust some of your Web browser's settings to use Siebel Web Client properly.

## Browser Security

If your browser security setting zone is set to medium or higher, you will be prompted by a security warning window when you launch your Siebel application. To remove this window and make sure it does not reappear, check the Always trust content from Siebel Systems, Inc. check box.

## Maintaining the Siebel Application in the Browser Window

If you are using Microsoft Internet Explorer, you can change a setting in Internet Options so that the Siebel application is not replaced when you launch Internet Explorer from a shortcut in another program.

***To maintain the Siebel application in the browser window***

1. Start Internet Explorer.
2. Choose Tools > Internet Options.

   The Internet Options dialog box appears.
3. In the Internet Options dialog box, click the Advanced tab.
4. Under Browsing, clear the Reuse windows for launching shortcuts check box.
5. Click OK.

# Exiting the Siebel Application

You should not close the browser window to exit the Siebel application. Instead, exit the application by choosing File > Log Out from the application-level menu.

# Understanding the Siebel Application Window 2

This chapter discusses the standard framework known as the Siebel application window. It is the same throughout all Siebel applications.

After reading this chapter, you will understand each part of the Siebel application window and its function in the application. In addition, you will understand the general navigation techniques for moving through Siebel applications.

# Home Page Overview

After you log in to Siebel Web Client, the first screen you see is your home page. Your home page displays the information that will be most useful to you on a daily basis, thus helping you manage your top priorities. For example:

- If you are a call center agent, it may be helpful for you to have a list of your open service requests that are being worked on.
- If you are a sales representative, it may be helpful for you to have a list of the open opportunities you are currently pursuing.
- It might be useful for you to have your daily calendar available to help you manage your day.

The information on your home page is determined by your organization. However, you can remove and rearrange its elements to better manage the information and determine what you see.

See "Customizing Your Home Page" on page 158 to learn how to modify your home page.

# Siebel Application Window Overview

Figure 2 shows important elements of the Siebel application window.

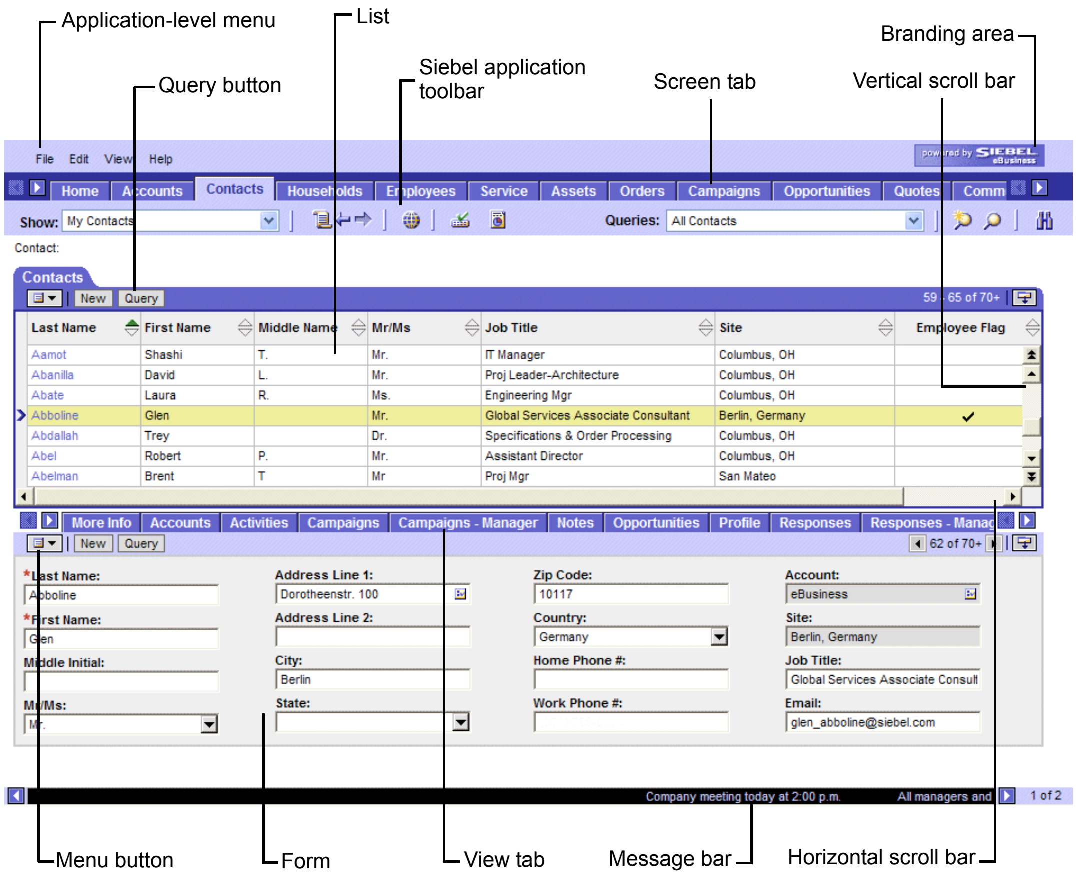


**Figure 2. Siebel Application Window Example**

# Siebel Application Window Components

When you use an application, it is important that you understand the features of the application window.

The top of the Siebel application window contains the following:

- "Application-Level Menu"
- "Branding Area" on page 29
- "Siebel Application Toolbar" on page 29

The rest of the window is used to display data in screens and views. See "Screens and Views" on page 31 for details.

## Application-Level Menu

Located in the upper left corner of the application window, the application-level menu consists of the File, Edit, View, and Help menus. The functionality provided by each menu in the application-level menu depends on the application and the configuration you are using.

**CAUTION:** The commands found in the application-level menu may not be available from every screen and view. See your Siebel administrator for more information.

### File Menu

Provides access to communication features, such as correspondence, email, fax, and page; save record functionality; synchronization; and logout. Table 4 provides a brief overview of each command available in the File menu.

**Table 4. File Menu Commands**

| File Menu Command | Description |
|---|---|
| Auto > Expense Report | Creates an expense report automatically. For more information about expense reports, see *Siebel Professional Services Automation Guide*. |
| Auto > Time Sheet | Creates a time sheet automatically. For more information about time sheets, see *Siebel Professional Services Automation Guide*. |

**Table 4. File Menu Commands**

| File Menu Command | Description |
|---|---|
| New > Record | Creates a new record in the selected form or list. For more information, see “Adding a Record” on page 63. |
| New > Communication | Creates a new communication. For more information about communications, see *Siebel Communications Server Administration Guide*. |
| New > Correspondence | Creates a new correspondence. For more information about correspondence, see *Siebel Sales User Guide*. |
| Save Record | Saves the current record. For more information, see “Saving Data” on page 62. |
| Send > Email | Allows you to send email directly from the Siebel application. For more information about send functionality, see “Emailing, Faxing, Paging, and Wireless Messaging” on page 109. |
| Send > Fax | Allows you to send a fax directly from the Siebel application. |
| Send > Page | Allows you to page someone directly from the Siebel application. |
| Send > Wireless Message | Allows you to send a message to another person’s wireless device from the Siebel application. |
| Synchronize > Database | Synchronizes your database. For more information about synchronizing your database, see “Synchronizing Data” on page 124. |
| Connect | Allows you to log on with an alternate User ID. |
| Log Out | Logs you out of the Siebel application and ends your session. |

## Edit Menu

Provides access to record and query features. Table 5 provides a brief overview of each command available in the Edit menu.

**Table 5. Edit Menu Commands**

| Edit Menu Command | Description |
|---|---|
| Undo Record | Deletes the most recent change you make to a record. For more information, see "Canceling Changes" on page 62. |
| Delete Record | Deletes the selected record. For more information, see "Deleting a Record" on page 65. |
| Edit Record | Puts the selected record into edit mode, allowing you to modify it.<br>You can also click in a record to edit it. If the Edit Record command is unavailable, you will probably be able to edit a record simply by clicking in its fields. For more information, see "Editing a Record" on page 65. |
| Copy Record | Creates a copy of the selected record. For more information, see "Copying a Record" on page 64. |
| Change Records | Launches the Change Records dialog box which allows you to modify a large number of records simultaneously. For more information see "Changing Multiple Records" on page 74. |
| Merge Records | Allows you to merge two or more records into one record. For more information see "Merging Duplicate Records" on page 70. |
| Select All | Highlights and selects every record in the selected list. |
| Query > New | Opens a blank query in the selected screen. For more information about querying, see "Common Query Tasks" on page 93. |
| Query > Run | Executes a newly created query. |
| Query > Refine | Allows you to refine a query. |
| Query > Save | Allows you to save a recently executed query. |

**Table 5. Edit Menu Commands**

| Edit Menu Command | Description |
|---|---|
| Query > Save As | Allows you to save a query with a new name. |
| Query > Delete | Launches the Save Query As dialog box, allowing you to delete a user-defined query. |

## View Menu

Provides access to the Site Map, reports, user preferences, columns displayed, and advanced sort. Table 6 provides a brief overview of each command available in the View menu.

**Table 6. View Menu Commands**

| View Menu Command | Description |
|---|---|
| Site Map | Opens the Site Map. For more information about the Site Map, see "Site Map" on page 32. |
| Reports | Launches the Reports dialog box. For more information about running reports, see "Running Reports" on page 106. |
| User Preferences | Opens the User Preferences screen. For more information about User Preferences, see "User Preferences" on page 161. |
| Columns Displayed | Launches the Columns Displayed dialog box which allows you to modify columns in a list. For more information, see "Columns Displayed" on page 82. |
| Search | Opens the Search Center. For more information about the Search Center, see "Using the Search Center" on page 101. |
| Advanced Sort | Launches the Advanced Sort dialog box which allows you to sort data in columns. For more information, see "Performing an Advanced Sort" on page 79. |
| First Records | Navigate to the first record in a form; navigate to the first set of records in a list. |
| Previous Records | Navigate to the previous record in a form; navigate to the previous set of records in a list. |
| Next Records | Navigate to the next record in a form; navigate to the next set of records in a list. |

**Table 6. View Menu Commands**

| View Menu Command | Description |
|---|---|
| Last Records | Navigate to the last record in a form; navigate to the last set of records in a list. |
| Open Customer Dashboard | Opens the customer dashboard. For more information about the customer dashboard, see *Siebel Call Center User Guide*. |
| Close Customer Dashboard | Closes the customer dashboard. |
| Clear Customer Dashboard | Clears the customer dashboard of customer information. |

## Help Menu

Provides access to Online Help, technical support information, and other help features. Table 7 provides a brief overview of each command available in the Help menu.

**Table 7. Help Menu Commands**

| Help Menu Command | Description |
|---|---|
| Contents | Opens *Online Help*. |
| Technical Support | Opens the Technical Support dialog box, which provides details about the Siebel application, including the version of the software you are using, the user name you logged in with, and other, more technical, details. |
| Suggestion Box | Opens a special survey on the Siebel Systems Web site in which you can provide suggestions for the Siebel product you are using. |
| About SRF | Opens the About SRF dialog box, which provides detailed technical information about the software repository file associated with the Siebel application you are running. |

**Table 7. Help Menu Commands**

| Help Menu Command | Description |
|---|---|
| About View | Opens the About View dialog box, which provides details about the screen, view, and technical components of what is currently being displayed in the application window. |
| About Siebel | Opens the About Siebel dialog box, which provides copyright information and a brief discussion of Siebel Systems' software products. |

# Branding Area

Located in the upper right corner of the application window, the branding area shows the Siebel Systems logo. Click the Siebel logo to access the Siebel Systems Web site.

# Siebel Application Toolbar

The Siebel application toolbar, shown in Figure 3, appears beneath the screen tabs, and displays frequently used tools such as the Show drop-down list, the back and forward navigation buttons, the Queries drop-down list, and the search button.

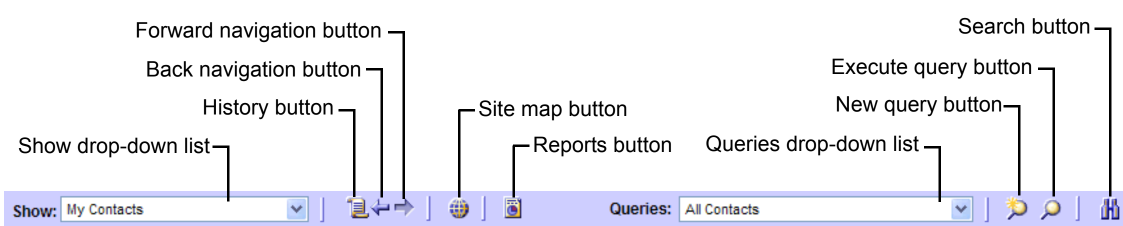


**Figure 3. Siebel Application Toolbar**

## Show Drop-Down List

The Show drop-down list displays the names of filters—such as My Accounts, All Accounts, and My Team's Accounts—which determine what data you see in a screen or a view. For more information about filters, see "Filtering a Set of Records" on page 33. The Show drop-down list also acts as a toggle to a different kind of view, such as an Explorer view.

## History Button

The history button accesses the History list, which stores the most recent views you have displayed, allowing you to navigate back to any of them. It is updated every time you move to a new view. You can specify the maximum number of views stored in the list from your User Preferences screen. See “Modifying the History List” on page 162.

---

**NOTE:** The History list not only shows the views you have visited, but it also indicates a specific record on that view that you selected. If you select a record you do not have access to, for example, if visibility rules on the record prohibit you from drilling down on the details of that record, the History list will not record information for the view.

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## Back and Forward Navigation Buttons

Use the back and forward navigation buttons to return to the last screen or view you accessed. They are located to the right of the history button.

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**CAUTION:** Do not try to use your Web browser's back and forward buttons to return to screens or views in your Siebel application.

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## Site Map Button

Use the site map button to navigate directly to the Site Map. The site map button is located to the right of the back and forward navigation buttons. For more information about the Site Map, see “Site Map” on page 32.

## Reports Button

Use the reports button on the Siebel application toolbar to access reports for the screen you are working in. The reports button is located to the right of the site map button. For more information about reports, see “Running Reports” on page 106.

## Queries Drop-Down List

The Queries drop-down list provides access to your saved queries and to the predefined queries established by your organization.

From the Queries drop-down list, you select a saved query, and the data matching the defined criteria is automatically displayed. For more information on query functionality, see "Common Query Tasks" on page 93.

### New Query Button

Use the new query button to launch a new query. The new query button is located on the toolbar to the right of the Queries drop-down list.

### Execute Query Button

Use the execute query button to execute a new query. The execute query button is located on the toolbar to the left of the search button.

### Search Button

The search button shows a pair of binoculars. This button is located directly to the right of the execute query button. Click this button to activate the Search Center. The Search Center allows you to search for and find records within the database. For more information on the search functionality, see "Using the Search Center" on page 101.

## Screens and Views

When you become familiar with the structure of the Siebel application window, you will be able to navigate to the information you need using the screen tabs, Site Map, Show drop-down list, menu button, Query button, thread bar, and view tabs. You can specify which screen and view tabs are displayed in your Siebel application from the User Preferences screen. For more information, see "View Personalization" on page 167.

### Screen Tabs

The application is organized into screens. Each screen covers a broad topic. You access a screen by clicking the related screen tab, such as Opportunities, Calendar, or Accounts.

To access a screen, click the corresponding tab. The screen appears and the tab changes color. Figure 4 shows an example of screen tabs, where Contacts is the active screen tab.


**Figure 4. Screen Tabs**

**Tab jump buttons**. If the screen tab you need is not visible, use the tab jump buttons to move forward or backward through the screen tabs. The tab jump buttons are positioned to the left and right of the currently displayed tabs, as shown in Figure 5

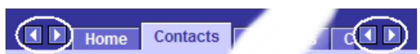


**Figure 5. Tab Jump Buttons**

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**NOTE:** Tab jump buttons are also available for navigating the view tabs.

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## Site Map

The screen tabs that appear in the application window are determined by your organization and may be only a subset of the available screen tabs. To see a listing of all the screens available to you, use the Site Map.

---

**NOTE:** Not all views available in a screen will necessarily appear in the Site Map. To see all views available in a screen, navigate to the screen and use the Show drop-down list or view tabs to access the view you want. For more information on the Show drop-down list, see "Show Drop-Down List" on page 33. For more information on view tabs, see "View Tabs" on page 37.

---

***To navigate to a screen using the Site Map***

**1** From the application-level menu, choose View > Site Map.

**2** In the Site Map, click the desired hyperlink to access the corresponding screen.

The Site Map displays the main views available in that screen.

If you select a screen from the Site Map that does not appear as a screen tab in your application, a screen tab will be created when you jump to that screen. It will only be available for the current session.

**3** Click the view hyperlink to jump to that screen and view.

---

**TIP:** You can also click the site map button on the toolbar to access the Site Map. For more information, see "Site Map Button" on page 30.

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## Show Drop-Down List

You use the Show drop-down list to display a specific set of records, such as My Accounts or All Accounts, as well as to view records in a different format, such as the Explorer view.

### Filtering a Set of Records

After identifying the desired screen and selecting the screen tab, you must decide what set of records you want to view in the selected screen. A default set of records appears below the screen tabs.

The Show drop-down list consists of filters, such as My Accounts, My Team's Accounts, and so on. Each filter is used to access a new set of records. Records consist of fields. For example, the fields in an Employee record might show an employee's name, address, and employee number.

Suppose you need to query for information about an account. However, the account is not owned by you. Currently, the default filter for the Accounts screen is My Accounts, which displays only your account records. To perform a query on every account record in the system that you have access to, you use the Show drop-down list and choose the All Accounts filter. You can then see all the account records that you have access to in the system.

Table 8 provides explanations for each filter in the Show drop-down list. The Accounts screen is used as an example, but these filters can appear in any screen. You may not see some filters shown in Table 8, depending on your responsibilities.

**Table 8. Show Drop-Down List Filters**

| Filter | Description |
|---|---|
| My Accounts | All the items that appear in this view are specific to you. You are the only one who can see these items, unless you are a member of a team that has access to them. |
| My Team's Accounts | This is typically a manager's view. It allows a manager to look at the items belonging to that manager's team. For example, a manager could click the My Team's Accounts view and see all the accounts that each team member is currently working on. |
| All Accounts | This allows you to see every account in the database to which you have access. |
| All Accounts Across My Organization | This view is usually intended for the CEO of a company so that the CEO can view every account in the database. |
| All Accounts Across Organizations | This view is for companies that have partnerships with other companies. It allows a user with the appropriate responsibilities to see all of the accounts in all of the companies. |
| Other's Activities | This view appears in the Activities screen. It allows you to view your own activities, the activities of direct reports, and the activities of any persons who have added you to their Calendar Access List. You can only see the activities for each of these users individually (as opposed to seeing them all in the same list). To see the activities for a specific user, pick that user from the drop-down list and then click Go. You can update another user's activities if you have been given update access in that user's Calendar Access List. You can also update the activities of any direct reports. |

After using a filter in the Show drop-down list to display a set of records, you select a record by clicking anywhere in the record. This highlights the record and, depending on where in the record you click, may put a field into edit mode.

### Selecting a Different View

You can also use the Show drop-down list to display data in different formats. For example, you can sometimes view the same data in a list, in an Explorer view, or in a Chart view.

The Explorer view is a way of displaying data in a hierarchical format, similar to that of Microsoft Windows Explorer. See "Explorer (Tree)" on page 45 for more information on this type of view.

The Chart view is a way of presenting data graphically to compare a record's data to other data. See "Charts" on page 43 for more information.

---

**NOTE:** Explorer and Chart views are not available in every screen.

---

## Menu Button

The menu button displays a menu of actions that apply to the active form, list, or Explorer view, or a selected record in a list. For more information on forms, lists, or Explorer views, see "Displaying Data" on page 40.

Through the menu button, you can perform actions such as copy, edit, delete, query, columns displayed, and advanced sort.

## Right-Clicking

Right-clicking in a form or a list displays the same menu of actions provided by the menu button in that form or list. Right-clicking outside of a form or a list will provide you with a menu of actions related to the entire Siebel application, such as creating a new record or opening the Search Center.

## Query Button

The Query button appears on forms and lists. Click Query to launch a blank query in a form or list. For more information about querying, see "Common Query Tasks" on page 93.

## Show More and Show Less Buttons

Every form or list has a show more button or a show less button in the top right corner. When the form or list is collapsed, you can click the show more button to expand it, as shown in Figure 6.


**Figure 6. Show More Button and Collapsed Form**

When the form or list is expanded, you can click the show less button to collapse it, as shown in Figure 7.


**Figure 7. Show Less Button and Expanded Form**

Clicking the show more or show less button in a form allows you to look at more or fewer fields; clicking the show more or show less button in a list allows you to look at more or fewer records, according to your needs.

## Horizontal Scroll Bars

Horizontal scroll bars appear beneath lists that contain more columns than can fit on the screen. Use the horizontal scroll bar to move through all the columns currently being displayed. To see if more columns are available for viewing, click the menu button, and then click Columns Displayed.

## Thread Bar

The thread bar, shown in Figure 8, appears immediately below the screen tabs. It helps you keep track of your navigational path when you drill across to a view on another screen using record hyperlinks. You can return to a previous point in the path by clicking the corresponding name on the thread bar. When you drill across screens using record hyperlinks, you remain in the same thread, which means that you may find yourself in a new screen and view, but you will not see all the records available in that screen and view. For example, if you were in the thread shown in Figure 8, you would see only the opportunities associated with the contact, Adams. If you want to see every opportunity to which you have access, you must click the current screen tab. Similarly, when you navigate to another screen using a screen tab or the Site Map, the thread bar resets and begins tracking your new path.


**Figure 8. Thread Bar**

## View Tabs

You use view tabs after you have selected the record you want to view or change. The view tabs show detailed presentations of data related to the selected record and screen.

The view tabs appear in the bottom part of the application window, below the screen tabs. The list of available views depends on which screen tab you have selected. Click a view tab to display the desired data for the record you have selected. For example, you may be looking at an account in the Accounts screen. Clicking the Contacts view tab displays the contacts associated with this account.

---

**TIP:** If the view tab you need is not visible, use the tab jump buttons to move forward or backward among the available view tabs. It may also be that you do not have a certain view tab set to show in your User Preferences. For more about showing and hiding view tabs, see "View Personalization" on page 167.

---

When you select a view tab, the record selected in the list above the view tabs may change to a form. More of the record's fields, which were not available for viewing in the list, appear. No other records are visible any more, so it is easier to focus on the selected record. To see every field in a record, click the More Info view tab, and then click the show more button to expand the form.

---

**NOTE:** In a few instances, you may find yourself unable to see the selected record when you navigate through the view tabs. This is because some views, such as the Explorer view, reset the records upon launch. It may also be a result of your access privileges.

---

## Subview

The subview appears directly below the information displayed for the selected view tab. The subview gives you more details about the record selected in the view. Not all views have subviews. If a view has a subview, it appears automatically. Figure 9 shows the Activity Plans view and the Activities subview.

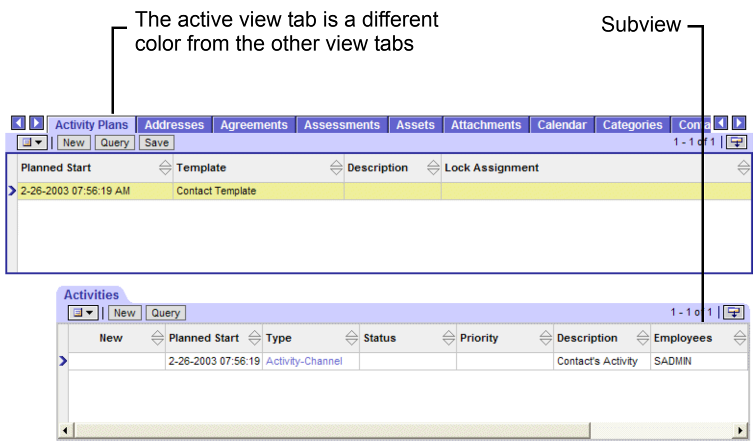



**Figure 9. Activity Plans View and Activities Subview**

# Displaying Data

You can display data in several ways. Data can be displayed in a list, a form, a chart, or an explorer-type hierarchy. Depending on the type of data you are displaying, one style may give you a better way to interpret the data than another. (Note that you may not always be able to view your data in all of these ways.)

**TIP:** Any of these types of views can be accessed from within one screen.


- "Vertical Scroll Bars" on page 40
- "Record Navigation Buttons" on page 41
- "Lists" on page 42
- "Forms" on page 43
- "Charts" on page 43
- "Explorer (Tree)" on page 45


## Vertical Scroll Bars

Use vertical scroll bars to navigate between records in a list. Vertical scroll bars appear to the right of lists. Using the vertical scroll bar you can navigate to the next record, the next record set, the previous record, or the previous record set, depending on the button you click. Figure 10 provides an example of the vertical scroll bar.

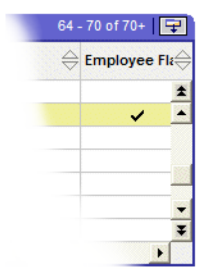
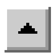
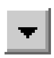



**Figure 10. Vertical Scroll Bar Buttons**

Table 9 provides a description of the vertical scroll bar buttons.

**Table 9. Description of Vertical Scroll Bar Buttons**

| Button | Description |
| --- | --- |
|  | Go to previous record set. |
|  | Go to previous record. |
|  | Go to next record. |
|  | Go to next record set. |

## Record Navigation Buttons

The record navigation buttons, highlighted in Figure 11, are found at the top right of each form. Use them to navigate between records. When you use the record navigation buttons in a form, you are navigating to the next record or the previous record.

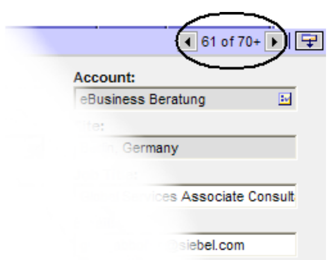



**Figure 11. Record Navigation Buttons**

# Lists

A list consists of multiple records, presented as rows. Each record consists of multiple fields. You can select a record in a list by clicking any field in the record. This causes the record to be highlighted and adds an active record indicator to the left of the record. If the field you click is editable, it will go into edit mode and you can enter a value. An example of the active record indicator is shown in Figure 12, a list is shown in Figure 13. There may be more records in a list than can be displayed on the screen. Use the vertical scroll bar, located to the right of the list, to move through the records.

You can select a record in a list by clicking any field in the record. This causes the record to be highlighted. If the field you click is editable, it will go into edit mode and you can enter text in it.

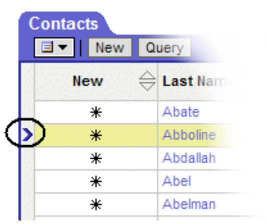



**Figure 12. Active Record Indicator in List**

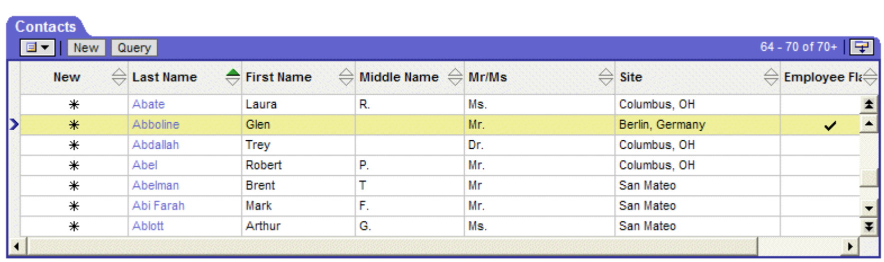



**Figure 13. List**

## Forms

A form displays one record at a time. When you drill down on a record in a list, you see a form, as shown in Figure 14, displaying data for the record you selected.

Use the record navigation buttons, located at the top right of the form, to navigate to the next or previous record.

If you have authorization to edit the information in a form, you can make edits directly in the form. Step off the record to save any edits you make. All required fields appear in the standard form (there is also a long form, which can be accessed by clicking the show more button) and appear with an asterisk.

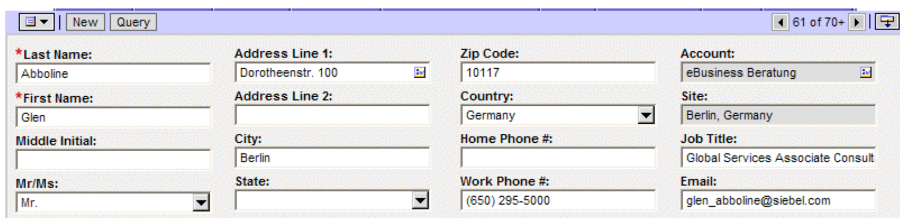



**Figure 14. Form**

## Charts

Sometimes data can be displayed in chart format. Charts are graphical representations of data and are available as views in some screens. Charts are used to compare data sets. An example of a Charts view is shown in Figure 15.

Use the Show drop-down list in the Charts view to determine which data is represented in the chart. This allows you to toggle between data sets. Most Charts views also include a drop-down list of chart types from which you can select the type of chart you want to see, for example a bar chart rather than a pie chart. Use the Go button next to the type drop-down list to change the chart's appearance.

**NOTE:** Charts views are not available in all screens.

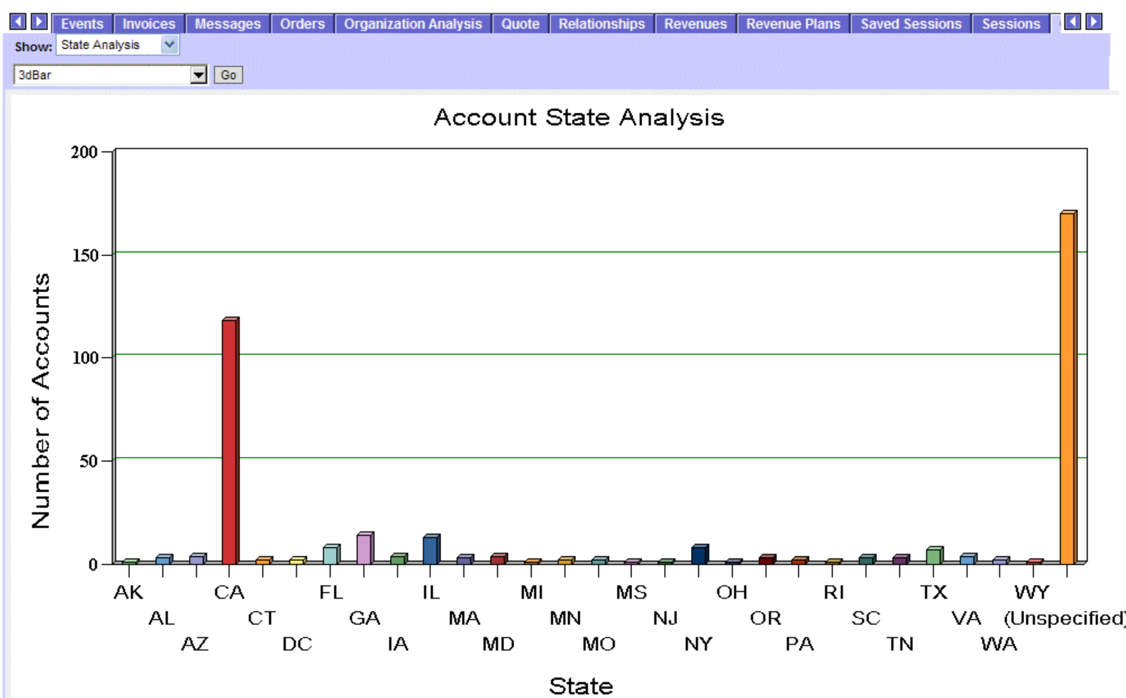



**Figure 15. Charts View**

## Explorer (Tree)

The Explorer (tree) view is a way of displaying data in a compact hierarchical format. Typically, you can access the Explorer view through the Show drop-down list in screens where it is available. Figure 16 shows an example of the Explorer view.

The Explorer view creates an expandable tree. The tree control is displayed in a frame on the left side of the content area. You select the control for the tree that you want to view and the detail information for the selected tree element appears in the frame to the right.

Any folder in the tree preceded by a plus sign ( + ) contains other folders. Click the plus sign to expand the folder and reveal its contents. The list to the right always reflects the contents of the folder currently selected in the tree. Use the minus sign (-) to collapse the information back into the folder.

**CAUTION:** If you do not have access to a parent record, you will not be able to access any of that record's related child or grandchild records in the Explorer view, even if you have access to the child or grandchild records.

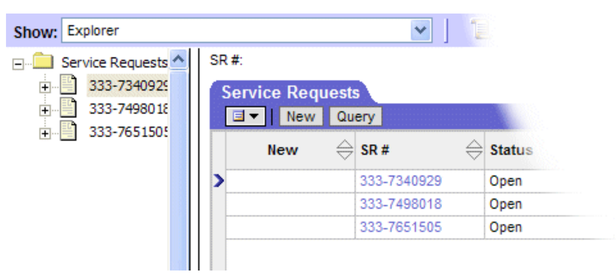



**Figure 16. Explorer View Example**

# 3 Working with Data

This chapter provides information about tasks such as adding, deleting, and editing records. You will become familiar with using field controls to add data to the system and will learn about the tools available for organizing your data.

# Records and Fields

A record is a group of related data organized into fields. For example, information about a contact, including last name, first name, address, and phone number, makes up a contact record. A record can appear in a list of related records, such as a list of contact records, or it can be displayed individually in a form. Figure 17 shows an example of a record in a list.

In some situations, you cannot see every field that belongs to a record. This may be because you are viewing the record in a list in which not all fields can be displayed because there is not enough room for them, or because you are viewing the record in a collapsed form. To view every field in a record, drill down on it in a list or click the show more button in the top right corner of the form to expand it if it is collapsed. For information about drilling down on a record, see "Using Record Hyperlinks" on page 62.

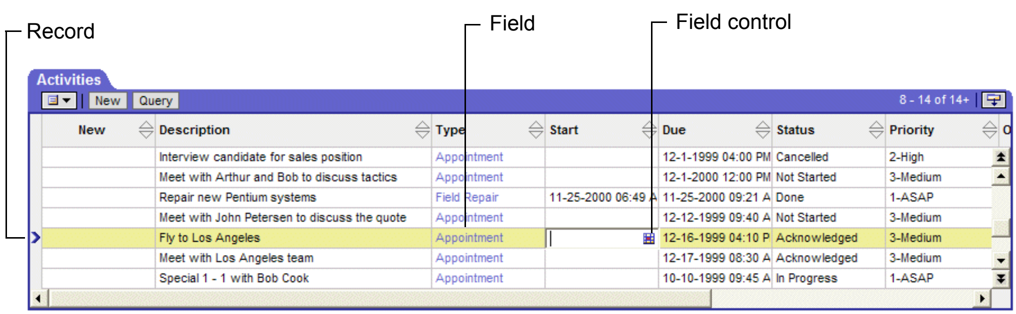



**Figure 17. Record in a List**

# Field Controls

You can enter data into the application by typing directly into fields or by using field controls. Field controls are tools that you use to interact with a record. A field control can be a check box, a drop-down list, a button, and so on.

Field controls allow you to do such things as choose from a list of predefined values, enter values in a multivalue field, specify dates, and calculate values.

A field control can appear within a form or as part of a record in a list. To use a field control to edit a record in a list, click the control to activate it. In a form, you can see the field control if one is available. In a list, you do not see a field control until you click in a field that includes one.

**NOTE:** A field that has an asterisk beside it is a required field. You cannot save a record until you have entered data in its required fields.

## Text Fields

A text field allows you to type text directly into it. Simply click within the field and begin typing. Figure 18 shows an example of a text field.

**NOTE:** Date fields will only allow you to enter dates between January 1, 1753 to December 31, 4712. If you enter an incorrect value in a date field, you will receive an error. For example, if you enter 01/01/19999, you will receive an error.

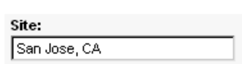



**Figure 18. Text Field**

**NOTE:** Many text fields can hold only a specific number of characters. The allowable number varies through the application. However, numerical fields only hold up to 14 characters.

You can launch a text editor from a text field in a list or form to create, edit, or view large amounts of text. This editor can be accessed by clicking the text editor button in the top right corner of the text field. In a list, this button appears only after the text field has been selected. Figure 19 shows an example of the Siebel Text Editor that launches when you click the text editor button.

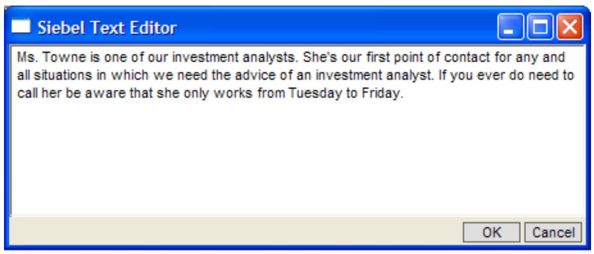



**Figure 19. Siebel Text Editor**

If a field has a gray background, the field is read-only and the content cannot be changed. Clicking the text editor button in a read-only field will launch a text reader. You cannot make changes to the text, but you can read it.

## Check Boxes

Check the box next to (or beneath) an option to select it. When you click an empty box, a check mark or an X appears in the box. If you click a box that is checked, the check mark or X disappears. Figure 20 shows an example of check boxes.


**Figure 20. Check Boxes**

## Option Buttons

Option buttons are also referred to as radio buttons. This type of field control allows you to choose one of several options in a set. An option button appears as a circle, with a smaller, filled circle inside it when the option is selected. You cannot choose more than one option button in a set. Figure 21 shows an example of option buttons.

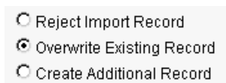



**Figure 21. Option Buttons**

## Drop-Down Lists

A drop-down list allows you to click a down-arrow button to the right of a field to select from a list of available values. Figure 22 shows an example of a drop-down list. You can also type the value or the starting letters of the value you are looking for in the drop-down field to automatically access it. After typing the value or starting letters of the value, tab or click off the field. The appropriate value appears in the field unless more than one value match the starting letters you entered. In this case, the drop-down list opens and you must select the appropriate value.

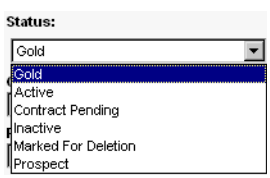



**Figure 22. Drop-Down List**

# Field Control Buttons

The field control buttons shown in Table 10 appear in many fields. You use field controls to work with records in your Siebel application.

**Table 10. Field Control Buttons**

| Button | Name | Name and Description |
|---|---|---|
|  | Calculator button | Activates a currency calculator to assist you with calculating figures. For more information, see "Currency Calculator" on page 53. |
|  | Calendar select button | Activates a calendar control for entering a date in a date field. For more information, see "Calendar Control" on page 53. |
|  | Text editor button | Launches a text editor. You can launch a text editor from a text field in a list or form to create, edit, or view large amounts of text. This editor can be accessed by clicking the text editor button in the top right corner of the text field. In a list, this button appears only after the text field has been selected. |
|  | Single select button | Launches a single selection dialog box. The single select button appears next to fields that provide single selection dialog boxes. For more information, see "Associating Records Using a Single Selection Dialog Box" on page 56. |
|  | Multiple select button | Launches a multiple selection dialog box. The multiple select button appears next to fields that provide multiple selection dialog boxes. For more information, see "Associating Records Using a Multiple Selection Dialog Box" on page 57. |

# Currency Calculator

This control is a calculator button that appears next to a currency field. When you click the button, a dialog box appears in which you can specify financial transaction information in foreign currencies. You can specify the country of origin, enter the date on which the transaction occurred, and perform mathematical operations. After computing a value with a calculator control, you can click anywhere outside of the control to save your selections and close the control. Table 11 describes each field control found in the currency calculator.

**Table 11. Currency Calculator Fields**

| Field | Field Control | Description |
|---|---|---|
| Currency Code | Single select button | Use the single select button to launch a dialog box in which you can select the country and currency code. |
| Exchange Date | Calendar | Use the calendar control to pick the exchange date. For more on the calendar control, see "Calendar Control." |
| Amount | Calculator | Type the currency amount in the Amount field, or use the pop-up calculator to enter the amount. |

# Calendar Control

You use the calendar control to select date and time information for a date/time field. You access the calendar control by clicking the calendar select button in any date or time field. Close the calendar control by clicking Save or by clicking outside of the control.

***To select a new date or time using the calendar control***

1. In the date or time field, click the calendar select button.

   The calendar control appears.

2. To change the month and the year, click the month or the year and then click a new value.

3. Use the up and down arrows to see and select earlier and later months and years.

4. To select a date, click the date in the calendar.

   The date you select is highlighted.

5. In the time field, specify the time.

   You can use the up and down arrows to change values, or you can type the time.

6. From the drop-down list that contains the time zones, select the time zone.

7. Click Save.

# Using Selection Dialog Boxes

Clicking the select button in a field causes a selection dialog box to appear. A selection dialog box allows you to associate a record that is appropriate to the field. Depending on the type of field, you can associate one record or multiple records. In some cases, you can also create a new record and then select it for association to the field.

## Launching Selection Dialog Boxes

There are two buttons, shown in Table 12, that launch selection dialog boxes.

**Table 12. Select Buttons**

| Button | Name |
|---|---|
|  | Single select button, launches a single selection dialog box. |
|  | Multiple select button, launches a multiple selection dialog box. |

**Single selection dialog boxes.** Single selection dialog boxes allow you to add a maximum of one record to a field. In some cases you can create a new record from the single selection dialog box.

**Multiple selection dialog boxes.** Multiple selection dialog boxes allow you to add more than one record to a field. In some cases you can create new records from the multiple selection dialog box. In some cases you can launch a shuttle applet to add existing records to the multiple selection dialog box.

**Shuttle applet.** Shuttle applets allow you to select a number of records and add them to a multiple selection dialog box. Shuttle applets can be launched from multiple selection dialog boxes by clicking New. An example of a shuttle applet is shown in Figure 23 on page 57.

**NOTE:** To select records in selection dialog boxes you can double-click, press ENTER on your keyboard, or click OK.

## Associating Records Using a Single Selection Dialog Box

Depending on where you are in the Siebel application, you can associate an existing record or a new record in a single selection dialog box.

***To associate an existing record using a single selection dialog box***

1. Navigate to the appropriate screen.
2. Select the record you want to associate with another record.
3. Click the single select button in the appropriate field.

   A single selection dialog box appears.
4. In the dialog box, locate and select the record you want to associate.
5. Click OK.

***To add a new record using a single selection dialog box***

1. Navigate to the appropriate screen.
2. Select the record with which you want to associate a new record.
3. Click the single select button in the appropriate field.

   A single selection dialog box appears.
4. Click New.
5. In the blank row that is inserted in the dialog box, enter the new record's information.
6. Click OK.

---

**NOTE:** There are some situations in which you cannot add new records to single selection dialog boxes.

---

## Associating Records Using a Multiple Selection Dialog Box

Multiple selection dialog boxes allow you to associate many records with one record. Clicking the New button in multiple selection dialog boxes launches a shuttle applet. An example of the shuttle applet is shown in Figure 23. Depending on where you are in the Siebel application, you may be able to add new records from the shuttle applet.

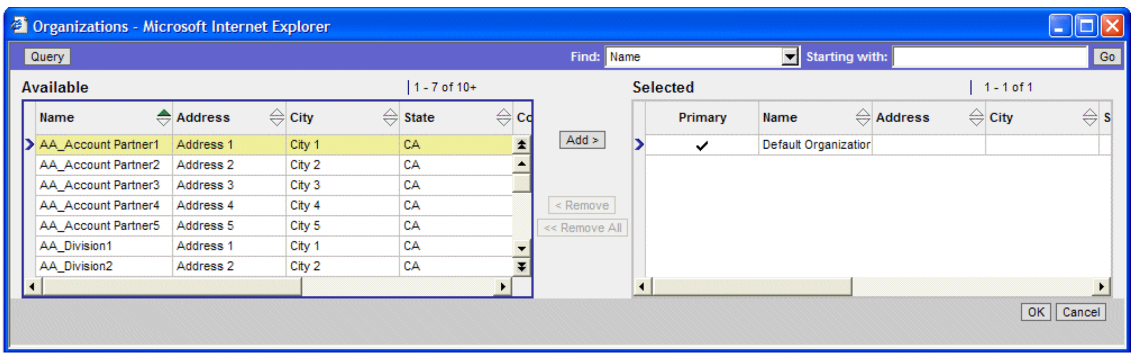



**Figure 23. Shuttle Applet Selection Dialog Box**

***To associate an existing record using a multiple selection dialog box***

1. Navigate to the appropriate screen.
2. Select the record you want to associate with other records.
3. Click the multiple select button in the appropriate field.

   A multiple selection dialog appears.
4. Click New to launch the shuttle applet.
5. From the Available list of records in the shuttle applet, select the record you want to associate with the current record.

   ---

   **NOTE:** You can select multiple records by holding down CTRL on your keyboard and clicking each record.

   ---
6. Click Add.
7. The record is moved from the Available list to the Selected list.

8. Click OK to close the shuttle applet.

***To add a new record using a multiple selection dialog box***

1. Navigate to the appropriate screen.
2. Select the record you want to associate with other records.
3. Click the multiple select button in the appropriate field.

   A multiple selection dialog appears.
4. Click New to launch the shuttle applet.
5. Click New in the shuttle applet to launch a blank form.
6. In the blank form that appears, enter the new record's information and click Save to return to the shuttle applet.

   The record you created now appears in the Selected list of records in the shuttle applet.

---

**NOTE:** If you attempt to add data to the database through a dialog box and then decide to cancel the record you are adding, the data you added in the dialog box will *not* be deleted from the database. However, if the data does not exist anywhere else in the application except in the record in which the dialog box was opened, it will be deleted.

---

## Finding Records in a Selection Dialog Box

A selection dialog box can contain many records. You may find it necessary to search for the information you need. Use the Find drop-down list and the starting with field for full or partial-text searches on one column.

---

**NOTE:** The Siebel application automatically assumes a wildcard exists at the end of text entered in the starting with field. This means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe*.

---

***To find a specific record in a selection dialog box***

1. In the selection dialog box, from the Find drop-down list, select the column you want to search on.
2. Type the text you are looking for in the Starting with text field.
3. Click Go.

   Records matching the search criteria appear in the dialog box.

4. Select the desired record and click OK.

**CAUTION:** Unlike when you perform a query, any spaces you enter in the starting with text field when performing a find will be searched for. Thus, if you are looking for a contact with the last name Smith, and enter Smith in the Starting with field followed by a space, any contacts with the last name Smith will not be found. This is because the system is looking for each character (all the letters in Smith *and* a space).

## Querying for Records in a Selection Dialog Box

You can query within a selection dialog box just as you would within a list or form. This allows you to search for specific information from one column or from several columns at one time. For information about query operators, see "Query Operators" on page 99.

**NOTE:** To execute a query in a selection dialog box, you can either click Go or press ENTER on your keyboard.

***To query in a selection dialog box***

1. In the selection dialog box, click Query.

   A blank row appears in the selection dialog box.

2. Enter your query criteria and click Go. (Clicking Cancel returns you to the original list of records in the selection dialog box.)

   ---

   **NOTE:** The Siebel application automatically assumes a wildcard exists at the end of text entered in the starting with field. This means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe*.

   ---

   The records matching the query you specified appear.

3. Select the desired record and click OK.

   The record is added to the field in which you launched the selection dialog box.

# Common Record Tasks

Working with records is a common task in a Siebel application. You may be adding or deleting a record, using a hyperlink in a record, or even attaching documents to a record.


- "Saving Data" on page 62
- "Canceling Changes" on page 62
- "Using Record Hyperlinks" on page 62
- "Adding a Record" on page 63
- "Copying a Record" on page 64
- "Editing a Record" on page 65
- "Deleting a Record" on page 65
- "Identifying a New Record" on page 66
- "Flagging a Record" on page 67
- "Adding a Note to a Record" on page 67
- "Associating a Record with Another Record" on page 68
- "About Record Feature" on page 69
- "Merging Duplicate Records" on page 70
- "Printing Records" on page 72
- "Spell Checking" on page 73
- "Changing Multiple Records" on page 74
- "Using Attachments" on page 75
- "Sorting Records in a List" on page 78
- "Freezing Columns in a List" on page 80
- "Organizing Columns in a List" on page 81

## Saving Data

When you are finished editing or adding a record in a form or a list, step off the record to commit the changes to the database. *Stepping off the record* means leaving it in any way—by moving to another record or by using the record navigation buttons. Your changes will be saved automatically. You can also click the menu button, and then click Save Record, or choose File > Save Record from the application-level menu.

**CAUTION:** If you try to edit a record at the same time as another user, you will see a warning message, and you will be unable to make any changes until the other user exits the record.

## Canceling Changes

You may find that you need to cancel edits you have made to a record before you save it. You can undo your edits to a record only if you have not saved it yet.

If you want to cancel edits in a form or a list, click the menu button, and then click Undo Record.

## Using Record Hyperlinks

Hyperlinks appear in a record that is in a list. They usually consist of blue text that becomes underlined when the cursor passes over it. A hyperlink provides one-click access to detailed or additional information for the underlined text. For example, when an account name appears as a field in a list, it is shown as a hyperlink. This hyperlink allows you to link directly to the account profile in the Accounts screen.

Clicking a hyperlink that accesses information associated with a selected record and remains within the current screen is called *drilling down*.

Clicking a hyperlink that accesses information that is related to the current record but is outside the current screen is called *drilling across*.

When you drill across screens using record hyperlinks, you will remain in the same thread. This means you may find yourself in a new screen and view, but you will not see all of the records available in that screen and view. If you want to see every record in the new screen, you must click the current screen tab.

**TIP:** You can use the thread bar to navigate back to the original record after drilling across. However, if you navigate to another screen using a screen tab or the Site Map, the thread bar resets.

## Adding a Record

You can add records throughout the Siebel application as follows:

- Click the New button.
- Click the menu button, and then click New Record.
- From the application-level menu, choose File > New > Record.
- Right-click in a list or form and choose New Record.
- Use the appropriate keyboard shortcut.

**NOTE:** For a list of keyboard shortcuts, see Appendix A, “Keyboard Shortcuts.”

When you add a record, a new record appears, containing fields that you need to complete. Depending on where you are in the application when you invoke the new record command, you receive either a new row in a list or a new form in which to enter your data. The following procedures show how to add records using some of the commands available throughout the application. You can use whichever method works best for you, or whichever method is available.

Some records contain read-only fields. Read-only fields are those in which you cannot enter data. You may not have user privileges that allow you to enter data in the read-only field, or the data may be automatically filled in by the system.

---

**NOTE:** Not all users can add new records. Your ability to do so depends on the responsibilities given to you by your administrator.

---

***To add a record using the New button***

1 In the list or form, click New.

   A new record appears.

2 Enter the appropriate data.

***To add a record using the menu button***

1 In the list or form, click the menu button, and then click New Record.

   A new record appears.

2 Enter the appropriate data.

***To add a record using the application-level menu***

1 In the list or form, from the application-level menu, choose File > New > Record.

   A new record appears.

2 Enter the appropriate information.

## Copying a Record

If a significant amount of data in a new record you want to add is similar to the data in an existing record, it may be more efficient to copy the existing record and then modify the copy.

***To copy an existing record***

1 Select the record you want to copy.

2. Click the menu button, and then click Copy Record.

   A new record with the copied information appears.

3. Change the necessary fields.

---

**NOTE:** You can also copy a record using keyboard shortcuts. For a list of keyboard shortcuts, see Appendix A, "Keyboard Shortcuts."

---

## Editing a Record

To edit a record, you must have appropriate access privileges. If you do, you can make edits directly to the list or form. Step off the record to save your changes.

## Deleting a Record

You can delete a record by using the menu button in a list or form, the application-level menu, or the appropriate keyboard shortcut. You can also delete a record using keyboard shortcuts. For a list of keyboard shortcuts, see Appendix A, "Keyboard Shortcuts."

***To delete a record using the menu button***

1. Select the record you want to delete.

   A blue border appears around the list or form that contains the selected record.

2. Click the menu button, and then click Delete Record.

   A dialog box appears, asking if you are certain that you want to delete the selected record.

3. Click OK to delete the record, or click Cancel to abort the deletion.

***To delete a record using the application-level menu***

1. Select the record you want to delete.

   A blue border appears around the list or form that contains the selected record.

2 From the application-level menu, choose Edit > Delete Record.

A dialog box appears, asking if you are certain that you want to delete the selected record

3 Click OK to delete the record, or click Cancel to abort the deletion.

**NOTE:** The system does not allow users to delete certain records.

## Identifying a New Record

If you are a member of a team that shares information, it is important for you to see any new records that have been added to that shared information. You can see a record automatically if you have access rights to view that record.

When you are working within a list, look for the New column. If a record has been newly added to your system, an asterisk appears in the New field in that record. This asterisk is shown in Figure 24 on page 67. You can remove an asterisk by drilling down on the record.

## Flagging a Record

In certain screens, such as Opportunities and Projects, you can flag records that you want to single out. A flag acts as a reminder that is visible only to you. To flag a record, click in the Priority Flag field of that record and check the check box. This places a flag in the record that you can query on and view in a list. The priority flag is shown in Figure 24.

**NOTE:** If you cannot see a Priority Flag column, check your Columns Displayed settings. The Priority Flag column is not available in all views. For information on using columns displayed, see "Columns Displayed" on page 82.

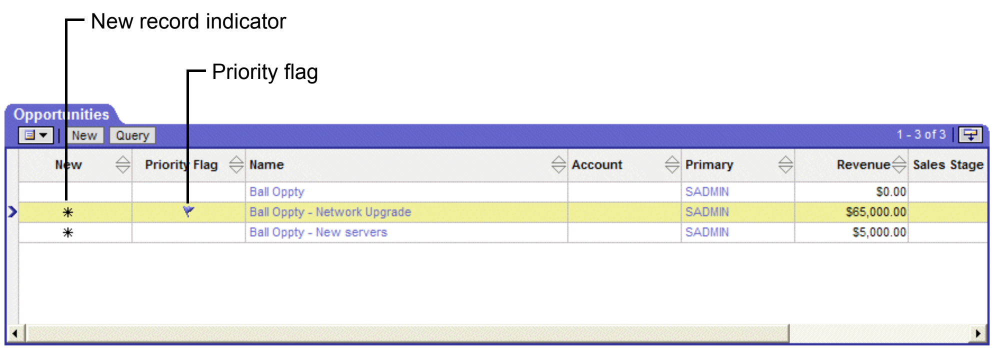



**Figure 24. New Record Indicator and Priority Flag**

## Adding a Note to a Record

When you are working with records, you will often find that you need to make notes. You can add a note to a record in the Notes view.

In the Notes view, you can enter public notes or private notes. A public note can be seen by anyone who has access to the record. A private note can be seen only by the person who enters the note.

The Notes view is not available in all screens. It appears only where it would be logical to keep notes for individual records, for instance in the Accounts, Contacts, and Opportunities screens.

***To add a note***

1. Navigate to the desired screen.
2. Select the record you want to add a note to.
3. Click the Notes view tab.
4. Select Private Notes or Public Notes from the drop-down list in the Notes view, depending on the kind of note you want to add.
5. Click New.

   A blank record appears.
6. From the new record's Type drop-down list, choose Note.
7. Click in the Description field and type the note.

   **TIP:** Use the Check Spelling button to make sure your note has no spelling errors. For more information about the spell-check feature, see "Spell Checking" on page 73.

   The note is added. Use the drop-down list in the Notes view to switch between public and private notes.

## Associating a Record with Another Record

When you are working with a record, you need access to all the information related to that record. Therefore, you can associate a record with another record.

For example, when you are working with an account, you will likely need to track key contacts for that account. The Contacts screen allows you to add and manage key contacts.

You will also find a Contacts view in many screens, for instance in the Accounts screen. Through this Contacts view, you can associate a contact with a particular account record.

***To associate a record with another record***

1. Navigate to the appropriate screen.

   The default list of records appears.

2. Select the record with which you want to associate your chosen record.

3. Click the appropriate view tab.

   The selected view appears.

4. In the selected view, click New.

   Depending on which view you are in, a blank record or a selection dialog box appears.

5. Do one of the following:

   - Select the record you want to associate from the dialog box and click OK.
   - Complete the fields of the blank record, thus adding a new record.

---

**NOTE:** You may not be able to associate records in all screens.

---

## About Record Feature

Use the About Record feature to access system information about a record, such as when it was last edited. An example of the About Record dialog box is shown in Figure 25.

With the desired record selected, click the menu button, and then click About Record to access the About Record dialog box.

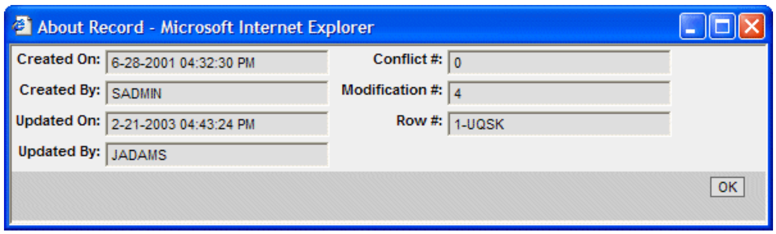



**Figure 25. About Record Dialog Box**

---

**NOTE:** If you access the About Record dialog box after merging records, it displays the last updated date for the remaining record. It does not show the merge date as the last updated date, nor does it show the last updated date for the record that was merged into the existing record.

---

## Merging Duplicate Records

You may sometimes find that two or more records contain the same information and that to keep the database accurate, the records should be merged into one. The Merge Records command allows you to merge a number of records into one.

---

**NOTE:** Depending on your access privileges and your configuration, merge functionality may not be available to you.

---

If other records are associated with the records you merge, those records, with the exception of duplicates, are associated with the surviving record; any duplicate associated records are deleted.

**CAUTION:** When you merge two records, only the top two levels of a record are combined. For example, if you merge an Account record that is associated with a Contact record, both levels are merged. But if there is also an Activity associated with the Contact record, it is not merged. Be careful when you merge records.

***To merge two records***

1. Select one of the records being merged, click the menu button, and then click About Record to record the Row #.
2. Repeat Step 1 for each record being merged.
3. Click the record that will be the source record.
4. Press and hold down CTRL on your keyboard and click the record that will survive. The source record will be merged *into* the surviving record.
5. Click the menu button, and then click Merge Records.

   A dialog box appears, as shown in Figure 26 on page 72, displaying the Row # of the surviving record, and asks if you want to proceed with the merge. Use the numbers you recorded before the merge to make sure the correct record survives.

   **NOTE:** If the Merge Records command is unavailable, the feature is not supported for the record types you have selected.

**6** Click OK to accept the merge, or Cancel to abort it.

The records are merged into a single record that bears the name of the record you designated as the surviving record, and includes the data from it.

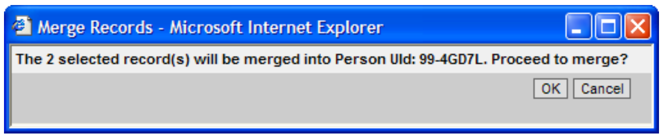



**Figure 26. Merge Records Dialog Box**

## Printing Records

You can print records by running a report and then printing the report. For more information about reports, see "Running Reports" on page 106.

---

**NOTE:** You can also use the Web browser's print function to print an image of the current screen. However, the options you select when using this function and the fields visible in the Web browser will affect the printed page or pages, which may or may not contain all the information in the screen.

---

## Spell Checking

You can perform a spell check from a number of places in your Siebel application. Sometimes there is a spell check button, and at other times the spell-check function can be accessed from the menu button. Some areas where spell check is available include the Notes view, the Service Request form, emails, faxes, pages, and wireless messages. In Notes views and Service Request forms, the spell check will check the proper spelling of text in Description and Summary fields. When you invoke the spell check from the menu button, for the spell check to work properly, you must first step off the record to save the record before selecting Spell Check from the menu button. Figure 27 shows an example of the Spelling dialog box.

---

**NOTE:** You can also set up your preferences so that all the emails, faxes, pages, or wireless messages you send from your Siebel application are automatically checked for spelling errors before they are sent to a recipient. For more information, see "Running a Spell Check Automatically" on page 165.

---

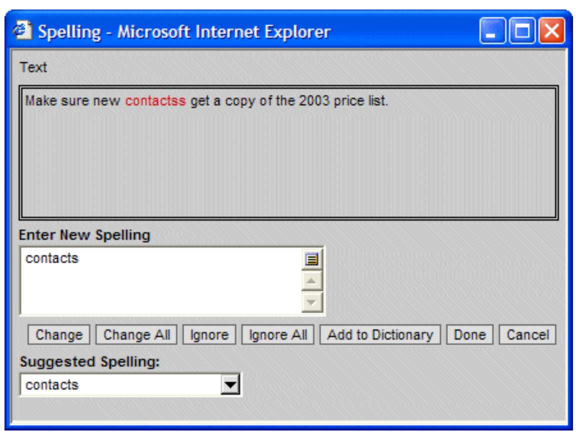



**Figure 27. Spelling Dialog Box**

## Changing Multiple Records

You may need to modify the same data in a number of records. Instead of repeatedly changing the same information in each record, you can change each affected record at once using the Change Records command. Figure 28 shows an example of the Change Records dialog box.

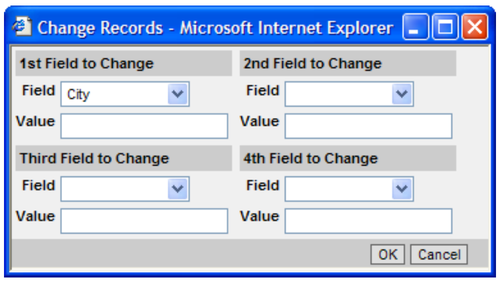



**Figure 28. Change Records Dialog Box**

***To change a set of records***

1. Navigate to the desired screen.
2. Select the records you want to change by holding down CTRL on your keyboard and clicking each record.
3. Click the menu button, and then click Change Records.

   The Change Records dialog box appears. You may change up to four fields at one time.
4. From the Field drop-down list, select the field in which you want to change data.
5. Enter the new data in the corresponding Value field.
6. Repeat Step 4 and Step 5 until you have entered all of the information you want to substitute in your chosen fields.
7. Click OK to apply the changes, or click Cancel to abort the changes.

## Using Attachments

You can attach a file created in another application to a record. Files can be attached to records wherever the Attachments view is available within a screen. The Attachments view is available only in those screens that would logically benefit from the addition of supporting material. For example, there are Attachments views in the Contacts, Accounts, and Opportunities screens.

The major benefit of the Attachments view is that it allows others who may be working with the same record to access the attachment. This provides team members with the latest information.

---

**NOTE:** When you use the Attachments view to download an attachment, and the file name of the attachment contains spaces, those spaces will automatically be changed to underscore (_) characters in the downloaded file. For example, if an attachment is called `a b.doc` in the Attachments view, the downloaded file name will be `a_b.doc`.

---

You can create an attachment by using the Attachments view's New File button, by using the Attachments view's New button, or by dragging a file into the Attachments list view. You can also attach a URL to a record.

---

**NOTE:** If you edit files attached to Siebel records, your changes are saved back to the Siebel file system when you step off the attachment record in the Siebel application.

---

***To attach a file to a record using the New File button***

1. Select the record to which the attachment will be added.
2. Click the Attachments view tab.

   The Attachments list appears.

3. Click New File.

   The Choose file dialog box appears.

4 Locate and select the file you want to attach to this record, and then click Open.

The Choose file dialog box closes and the file appears in the Attachments list as a new attachment record with the appropriate fields filled in. Some fields are described in the following table:

| Field Name | Comments |
|---|---|
| Update File | A check mark in this field indicates that users want their copy of the file to be updated automatically each time the original file is updated. |
| Download File | Allows users to request files from the server. When a check mark appears in this field, the document is retrieved during the next synchronization session. This field applies to you only if you use Siebel Remote. |

***To attach a file to a record using the New button***

1 Select the record to which the attachment will be added.

2 Click the Attachments view tab.

The Attachments list appears.

3 Click New.

A blank record appears.

4 Click the Attachment Name select button.

The Add Attachment dialog box appears.

5 Click Browse.

The Choose file dialog box appears.

6 Locate and select the file you want to attach to this record, and then click Open.

The Add Attachment dialog box closes and the file appears in the Attachments list as a new attachment record with the appropriate fields filled in.

***To attach a file to a record using drag-and-drop***

1. Select the record to which the attachment will be added.
2. Click the Attachments view tab.

   The Attachments list appears.

3. Locate and select the file you want to attach to this record.
4. Drag the file to the Attachments list view and drop it there.

   The file appears in the Attachments list as a new attachment record with the appropriate fields filled in.

***To attach a URL to a record***

1. Select the record to which the URL will be attached.
2. Click the Attachments view tab.

   The Attachments list appears.

3. Click New URL.

   The Add URL dialog box appears.

4. Enter the URL in the URL field or copy and paste the URL from a Web page into the URL field and then click Add.

   The URL appears as a hyperlink in the Attachments list. You can click it to access the corresponding Web site.

---

**NOTE:** If you cannot access the Web site after adding it as an attachment, it may be because you are not connected to the network.

---

# Sorting Records in a List

Records in a list can be sorted on a column. For example, accounts can be sorted to appear alphabetically by name (by sorting on the Name column). In addition, an advanced sort allows you to sort on up to three columns at once. You might want to sort the accounts by name, then by current volume of sales, and then by city.

**CAUTION:** If you have used any special characters in a field, such as parentheses, you may encounter problems when you try to sort records.

## Sorting on One Column

Often you need to sort on only one column of data. Use the ascending (up) and descending (down) arrows to sort on an individual column in ascending or descending order. An ascending sort organizes records from 0 to 9 and A to Z; a descending sort organizes records from 9 to 0 and Z to A. Green indicates the active direction of the sort. The Last Name column in Figure 29 is sorted in ascending order.


**Figure 29. Ascending and Descending Arrows**

***To sort on a single column***

1 In a list, use the column headings to decide which column to sort on.

**NOTE:** Not all columns are sortable. You can sort only on columns that contain ascending and descending arrows in the column header.

2 Click the up arrow to sort the column’s data in ascending order or click the down arrow to sort the column’s data in descending order.

One arrow in the sorted column will be green, indicating the direction of the sort.

**NOTE:** The sort order is reset when you leave the screen, unless you save it as part of a query. This option is only available from My views. For more information on querying, see “Using Queries” on page 91.

## Performing an Advanced Sort

The advanced sort feature allows you to sort on up to three columns at once. Figure 30 shows an example of the Sort Order dialog box.

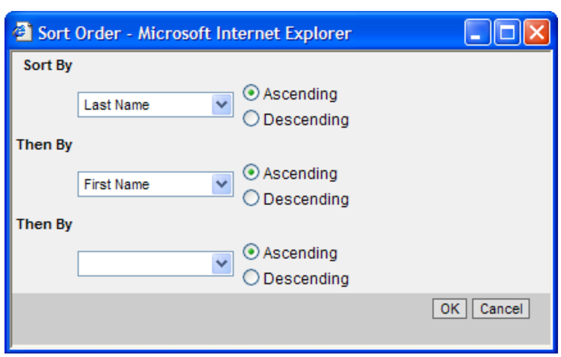



**Figure 30. Sort Order Dialog Box**

***To perform an advanced sort***

1. In a list, click the menu button, and then click Advanced Sort.

   The Sort Order dialog box appears.

2. From the Sort by field, click the down-arrow button and select the column on which you want to sort first.

3. Click the Ascending or Descending option button for your sort order.

4. From the Then by field, click the down-arrow button and select another column for your sort. Indicate sort order by clicking the Ascending or Descending option button.

5. To sort on three columns, select the second Then by down-arrow button, make another column selection, and indicate the sort order.

6. Click OK.

   The columns are sorted in the order you specified.

## Freezing Columns in a List

Lists can contain many columns. You may find that you want to scroll to the right and view columns you cannot see without losing focus of the left-most columns. You can do this by freezing the desired left-most columns.

***To freeze columns in a list***

1. Select the list in which you want to freeze columns.

2. Double-click the column header of the right-most column you want to freeze.

   The frozen column headers now appear with a darker gray background. In addition, a dark gray vertical line appears separating the frozen columns from the unfrozen columns. An example of a list with frozen columns is shown in Figure 31 on page 81.

**3** Scroll to the right to view columns without losing focus of the frozen columns on the left.

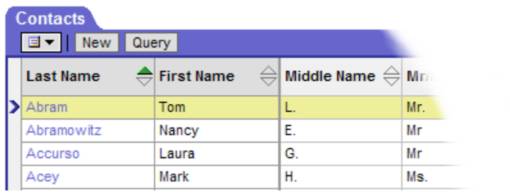



**Figure 31. Columns Frozen in a List**

---

**NOTE:** To unfreeze columns, double-click the header of the right-most frozen column. This is the same column you double-clicked to freeze the columns.

---

## Organizing Columns in a List

A list consists of many columns of data, some of which may not be displayed on screen. Depending on the columns you need to work with, you can add, remove, or rearrange the columns in the order that works best for you.

## Columns Displayed

See Table 13 for explanations of each button in the Columns Displayed dialog box. An example of the Columns Displayed dialog box appears in Figure 32 on page 83.

**Table 13. Columns Displayed Buttons**

| Button | Description |
|---|---|
|  | Moves a selected column down one position in the Selected Columns list. This moves the column to the right in the list you are modifying. |
|  | Moves a selected column up one position in the Selected Columns list. This moves the column to the left in the list you are modifying. |
|  | Moves a selected column to the bottom of the Selected Columns list. This moves the column all the way to the right in the list you are modifying. |
|  | Moves a selected column to the top of the Selected Columns list. This moves the column all the way to the left in the list you are modifying. |
|  | Shows the selected columns. |
|  | Hides the selected columns. |
|  | Shows all columns. |
|  | Hides all columns. |

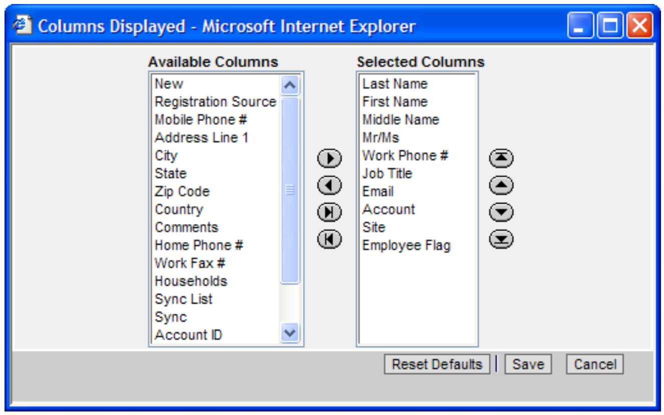



**Figure 32. Columns Displayed Dialog Box Example**

***To change the way columns are displayed***

**1** In a list, click the menu button, and then click Columns Displayed.

The Columns Displayed dialog box appears.

**2** Use the column-ordering buttons to the right of the Selected Columns area to change the order in which the columns appear in the list.

**3** Use the buttons to the right of the Available Columns area to show or hide the various columns.

**4** Click Save to execute the changes, Cancel to abort the changes, or Reset Defaults to restore the default column settings.

---

**NOTE:** The Columns Displayed feature is available only in lists. To see every field in a form, click the show more button.

---

## Resizing Columns

You may find that you need to alter the width of a column to better view data. If you want to save a changed column size, you must first use the Columns Displayed dialog box to save all column settings into your user preferences.

#### *To resize columns*

1. Place the cursor over the column header divider.

   A resize arrow appears.

2. Click and drag the column divider right or left to widen or narrow the column to the left of the arrow.

#### *To save column size changes*

1. Navigate to the list containing the columns you want to resize.
2. Click the menu button, and then click Columns Displayed.

   The Columns Displayed dialog box appears.

3. Click Save.
4. Resize the desired columns.

   The column size is saved into your user preferences.

# About Keyboard Shortcuts

Keyboard shortcuts allow you to use sequences of keystrokes as an alternative to the mouse for executing commands and navigating through your Siebel application. Typically these key sequences are combinations of CTRL, ALT, and SHIFT, along with the standard keys on your keyboard.

Many of the default keyboard shortcuts provided by your Web browser are also available for use in Siebel applications. For example, you can navigate sequentially through fields within the application views using TAB.

## Useful Command Shortcuts

- **Record Manipulation.** New Record, Delete Record, Copy Record, Edit Record, Save Record, Undo Record.
- **Query Management.** New Query, Execute Query, Refine Query, Save Query As.
- **Record Navigation.** Next Record, Previous Record, Next Page, Previous Page.

For a list of shortcuts, see Appendix A, “Keyboard Shortcuts.”

## Modes of Operation

Keyboard shortcuts are available in two modes: basic and extended. A shortcut can be specific to one mode or it can be common to both modes. A full set of keyboard shortcuts ships with Siebel applications. These shortcuts are defined in Siebel Tools. If you need to know which mode is implemented with your Siebel application, ask your Siebel administrator.

### Extended Mode

Extended-mode keyboard shortcuts are the default mode of operation for Siebel applications. Extended-mode shortcuts can include any key sequence, including the ones already used by your Web browser. In a case in which the Siebel application and the Web browser use an identical key sequence, the extended Siebel shortcut wins, and the browser shortcut fails. Extended-mode shortcuts can include any special keys, such as function keys or arrow keys, in their key combinations.

To use extended-mode shortcuts, your browser must be configured to accept ActiveX controls. Your Siebel administrator may have already set up your machine to do this, or you may be prompted by a dialog box when you first log in to your Siebel application to accept a software download from Siebel Systems.

### Basic Mode

Basic-mode keyboard shortcuts cannot include any key sequences already being used by your Web browser. In a case in which the Siebel application and the Web browser use an identical key sequence, the Web browser shortcut wins and the basic Siebel shortcut fails. Basic-mode shortcuts can only use standard keys, such as letters and numbers.

---

**NOTE:** If you are unsure which keyboard shortcuts you should use, see your Siebel administrator.

---

# Data Quality

The Siebel Data Quality module helps you maintain the integrity of your information through “Matching” and “Data Cleansing.”

For more information about data quality, see *Siebel Data Quality Administration Guide*.

## Matching

Matching identifies records that may be duplicates. For example, it identifies *Bill J. Smith* and *William Smythe* as possible duplicates. It also identifies *International Business Machines* and *IBM* as possible duplicates. If data you are adding or modifying is a possible duplicate, the Possible Matches dialog box will appear when you try to save the record. The Possible Matches dialog box lists existing records that may be duplicates of the record you are adding or modifying. You can choose to add the new record or select an existing record from this list. If you select an existing record, the record you were creating is deleted.

When records are identified as being duplicates, you must use the merge record functionality to combine them. For more information on merging records, see “Merging Duplicate Records” on page 70.

**TIP:** Avoid using apostrophes in your data, because these are used in querying as string delimiters. If you run queries on your data, you will receive error messages if you have apostrophes in your data.

## Data Cleansing

Data cleansing fixes inaccurate and inconsistent data for new or modified account, contact, and prospect records. The data is fixed as follows:

### Address Correction

Addresses are stored in a consistent format. For example, 1855 South Grant Street, San Mateo, CA 94401 becomes 1855 S. Grant St., San Mateo, CA 94401-3256.

### Standardization

Names of contacts, accounts, and prospects are stored in a consistent format. For example, Siebel Systems, Incorporated becomes Siebel Systems, Inc.

### Capitalization

Names and addresses are converted to mixed case, all lowercase, or all uppercase. For example, john smith becomes John Smith.

### Truncation

Any hyphenated names in the First Name field are truncated so that only one name is stored in the field. For example, Jean-Paul becomes Jean.

# Locating Information 4

This chapter explains how to locate the information you need. You can use the following methods:

### Query

Searches the database for a specific subset of data based on one or more conditions or criteria. For example, you may need to find all open service requests with a high priority. This query is performed in the Service screen with the query criteria of Status = Open and Priority = High.

### Search

A text retrieval tool that allows you to perform searches for text within your application and in documents inside and outside your application. You can perform searches from anywhere within a Siebel application.

---

**TIP:** You can define a default query for each screen so that when you access that screen, that query is applied to the data in that screen. For more information, see "Setting Up Default Queries" on page 164.

---

# Finding Search and Query Information

Table 14 explains where to find more information on searching and querying.

**Table 14. Where To Find Search and Query Information**

| For Information on This... | See This... |
|---|---|
| Basic query tasks | *Fundamentals*<br>*Online Help* |
| Query operators | *Fundamentals*<br>*Online Help* |
| Advanced query tasks | *Siebel Tools Reference* |
| Setting up predefined queries (PDQs) | *Applications Administration Guide* |
| Search functionality | *Fundamentals*<br>*Online Help*<br>*Siebel Search Administration Guide* |
| Search operators | *Siebel Search Administration Guide* |
| Advanced search functionality | *Personalization Administration Guide* |

# Using Queries

Querying is a way to locate one or more records that meet your specified criteria. The subset of records found by a query can be viewed onscreen, exported to a file, or used as input for a report.

When a query is created, the criteria can be saved and reused.

## Predefined Queries

Predefined queries (PDQs) can be provided by your organization. These predefined queries already have their criteria established and are found in the Queries drop-down list.

For example, if you are located in the western United States and always work with accounts located in California, you may find a PDQ that brings up all accounts in California in the Queries drop-down list as CA Accounts. Every time you want to see only the California accounts, you do not have to create a new query. You can simply select the predefined CA Accounts query from the Queries drop-down list. An example of the Queries drop-down list is shown in Figure 33.

You cannot edit any predefined queries created by your organization and saved in the Queries drop-down list. You can edit only queries that you create and save. (These will also appear in the Queries drop-down list.)

When you execute a predefined query, the query always runs against *all* the data in the current screen. Even if you have run a query to narrow the data set, the predefined query always uses *all* data within the screen, not just the data shown in a list.

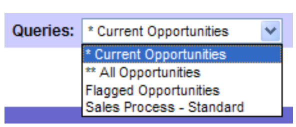



**Figure 33. Queries Drop-Down List**

## User-Defined Queries

You can create your own queries and save them in the Queries drop-down list for later use. Queries that you create are called user-defined queries. They allow you to enter your own criteria to locate a specific set of records.

## Query Commands: Creating a Query

There are several ways to begin creating a query in your Siebel application:

- Click Query in any form or list.
- Click the new query button on the toolbar.
- Click the menu button, and then click New Query.
- Right-click in a list or form and choose New Query.
- Choose Edit > Query > New from the application-level menu.
- Use the appropriate keyboard shortcut.

## Query Comments: Executing a Query

There are several ways to execute a query in your Siebel application:

- Click Go, where it is available.
- Click the execute query button on the toolbar.
- Click the menu button, and then click Run Query.
- Right-click in a list or form and choose New Query.
- Choose Edit > Query > Run from the application-level menu.
- Use the appropriate keyboard shortcut.

## Query Commands: Refining a Query

There are also several ways to refine a query in your Siebel application:

- Click the menu button, and then click Refine Query.

- Right-click in a list or form and choose Refine Query.
- Choose Edit > Query > Refine from the application-level menu.
- Use the appropriate keyboard shortcut.

**NOTE:** For a list of keyboard shortcuts, see Appendix A, "Keyboard Shortcuts."

## Common Query Tasks

The following procedures show how to perform common query tasks.

***To create, execute, and save a new query***

1. Navigate to the desired screen.
2. In the list or form, click Query.

   A blank form or a blank row in a list appears, depending on where you are when you invoke the new query command.
3. Enter the query criteria in the appropriate fields.
4. Click the menu button, and then click Run Query.

   The query is executed and the records appear.
5. Click the menu button, and then click Save Query As.

   The Save Query As dialog box appears.
6. In the Query Name field, enter a name for the query and click OK.

   The saved query now appears in the Queries drop-down list.

**TIP:** If you cannot locate the field you want to query on, you have probably launched the query from a collapsed form. Click Cancel to return to the form, and click the show more button on the form to expand it. Start a new query. The field should now be available.

#### *To refine a saved query*

1. Navigate to the desired screen.
2. From the Queries drop-down list, select the desired query.

   The records meeting the query criteria appear.
3. Click the menu button, and then click Refine Query.
4. Add and edit the desired criteria.
5. Click the menu button, and then click Run Query.

   The query is executed and the records appear.

#### *To delete a saved query*

1. Navigate to the desired screen.
2. From the application-level menu, choose Edit > Query > Delete.

   The Delete Record dialog box appears, showing the user-defined queries for that screen.
3. Select the query you want to delete in the Query Name list.
4. Click OK to delete the query or Cancel to abort the deletion.

## Querying Within a Selection Dialog Box

You can also query for the information you are looking for within a selection dialog box by clicking the Query button. For more information, see "Querying for Records in a Selection Dialog Box" on page 59.

# Using the Query Assistant

After clicking Query in a form or list, you can click Query Assistant to launch a dialog box which will guide you through creating a query. The Query Assistant button appears to the right of the Cancel button after you click Query. The Query Assistant dialog box can be helpful if you do not want to add your own query operators or are not familiar with query operators. When you use the Query Assistant, you do not need to enter operators to find the information you are looking for. You can also save your query by clicking Save Query before you execute the query. The query assistant example shown in Figure 34 is querying for all accounts in which the value in the City field is San Francisco and the value in the Potential Volume field exceeds $10,000. Querying in the Query Assistant is case-insensitive.

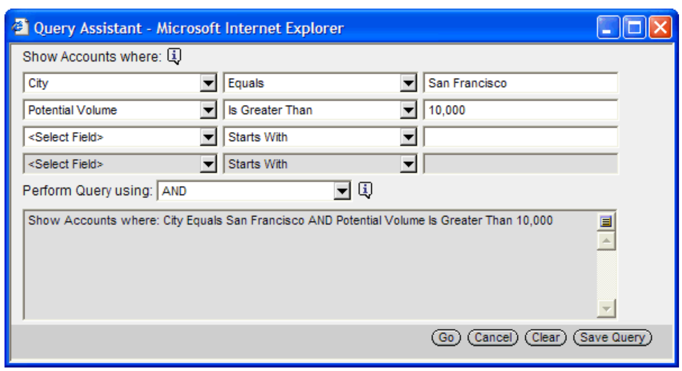



**Figure 34. Query Assistant Dialog Box Example**

***To perform a query using the Query Assistant***

**1** Navigate to the desired screen.

**2** In the list or form, click Query.

A blank form or a blank row in a list appears, depending on where you are when you invoke the new query command.

**3** Click Query Assistant to launch the Query Assistant dialog box.

**4** In the first row, from the Select Field drop-down list, choose a field to query on.

5 In the first row, from the drop-down list to the right of the field you just selected, choose an operator for the query.

6 In the first row, in the field to the right of the operator you just selected, enter the value you want to query for.

7 Fill in other rows as desired.

8 Select AND or OR from the Perform Query using drop-down list to specify the type of query you want to run. Selecting AND will only show results that meet all the criteria. Selecting OR will show results that meet any of the criteria.

9 Click Go.

   The query is executed, the Query Assistant is closed, and the records appear.

**NOTE:** If there are no values in the Query Assistant's drop-down lists, your Siebel administrator will have to refer to *Maintenance Release Guide* on SupportWeb.

## Query Tips

When you are creating and executing queries, keep the following tips in mind:

- The Siebel application automatically adds a wildcard to the end of your query. This means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe*.
- When you create a query, the records matching the query criteria appear in a list. As you work with the records in the list and move through the views within the current screen, the list continues to show the records that were found when the query was created. The list is reset to the default list of records when you leave the current screen.
- If you no longer need the list of records found in a query and want to reset the list, click the current screen tab to return to the default set of records.

- If a predefined query created by your organization appears in the Queries drop-down list, you cannot delete this query from your list. However, you can modify the query criteria and save them using another name. Select the query from the Queries drop-down list. Click the menu button, and then click Refine Query. You can now see the query criteria that make up the predefined query and edit the query as needed. To save the query using another name, choose Edit > Query > Save As from the application-level menu.
- You cannot query on Notes views when you are connected to the server.
- Any queries executed in Administration screens against multi-value group fields will automatically be appended by EXISTS(). This allows you to see every record, regardless of whether it is a primary record or not.
- When you create a query and navigate through the views, use the More Info view tab to go back to the queried list of records.
- If you are executing a query that includes more than one consecutive blank space, you must place quotes around the query or the spaces will be ignored and you will receive inaccurate results.
- When the results appear in list format, the first record is highlighted. It may appear as though the record you selected before running the query is being displayed again, but you are actually seeing a new set of records resulting from your query.

## Using Default Queries

When you navigate to any new screen, the records that appear are based on the default query set up for that screen. You can specify a different default query from the User Preferences screen. For more information, see “Setting Up Default Queries” on page 164. If there is no default query set up, the first predefined query in the Queries drop-down list will execute.

---

**NOTE:** You cannot indicate a blank query as the default. There is no way to set user preferences so that no query is executed when you navigate to a new screen.

---

If you have set up default queries for a Show drop-down list filter, it will only be executed if you access that view using the Site Map link. Using the Show drop-down list to access that filter's default query will fail. If the Show drop-down list filter in question has been set up as the default view for that screen, clicking the screen tab will execute the default query for the filter.

## Querying a Telephone Number

When you perform a query on a telephone number, the country code of the default country specified in your computer's regional settings automatically prefixes the query (unless the default country is the United States, in which case no prefix is added). For example, if the default country is Germany, and you type 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, you must specify the country code in the query. To avoid limiting the query to one country, you must refine the query and remove the country code portion.

For example, a European user enters the phone numbers of his business contacts throughout the continent. Whenever he travels to another country, he sets the default country on his laptop computer to that country. When he is in Germany, he needs local phone numbers; therefore, German numbers are returned by default on each query. If he wants to find the number of a contact in England while in Germany, he must enter +44 before his query. When he next travels to England, he will not use his German and Italian contacts as much; therefore, only English numbers will be returned (by default) on each query.

**CAUTION:** Including a hyphen in your telephone number query will cause the query to fail. Do not include hyphens when querying a telephone number.

## Query Operators

You can use several common query operators to define your query criteria.

Table 15 shows these commonly used query operators. For more query operators, see Appendix B, "Query Operators."

**CAUTION:** Query operators are reserved in Siebel query language. If you create a query that has a query operator in it, you must put the query in double quotes. For example, running a query for records containing the text *call is closed* will fail. The word IS falls into the category of reserved Siebel query language, because it is used in the query operators IS NULL, IS NOT NULL, and so on. If you put *"call is closed"* in double quotes, the system will be able to return all records containing the text *call is closed*. Other reserved operators include apostrophe ('), comma (,), parentheses (()), double quotes (""), tilde ( ~ ), and comparison operators such as =, <, and >.

**Table 15. Common Query Operators**

| Operator | Description | Example |
|---|---|---|
| = | Equal to | `=CA` retrieves all records in which the value in the query field is CA. |
| < | Less than | `<4/25/01` retrieves all records in which the value in the query field is before the given date. |
| > | Greater than | `>4/25/01` retrieves all records in which the value in the query field is after the given date. |
| < > | Not equal to | `<>CA` retrieves all records in which the state is not CA. |
| < = | Less than or equal to | `<=4/25/01` retrieves all records in which the value in the query field is on or before the given date. |
| > = | Greater than or equal to | `>=4/25/01` retrieves all records in which the value in the query field is on or after the given date. |
| * | Wildcard | `Sie*` retrieves any names that begin with the letters *Sie*. Wildcards can also be placed in the middle or at the beginning of a text string. |

**Table 15. Common Query Operators**

| Operator | Description | Example |
|---|---|---|
| `""` | Double quotes | `"Siebel Systems"` retrieves all records that contain *Siebel Systems* in the query field. Text in double quotes, unless modified by a wildcard, must be matched exactly. If your query includes a blank space, you must enclose the query between double quotes or the space will be ignored. |
| `~` | Approximately | Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case. `~LIKE Smi*` finds all records in which the value in the query field starts with *Smi*, *smi*, *SMI*, and so on. Using this operator may affect performance. |

# Using the Search Center

Siebel Search Center allows you to search for information and view the results without losing the current data on your screen. You can create searches from anywhere within your Siebel application using the Search Center.

Use the search button, which shows a pair of binoculars, to open the Search Center. The search button is located to the right of the execute query button on the Siebel application toolbar. The Search Center opens in a frame at the right of the screen, while the data you are currently displaying is maintained at the left of the screen. Figure 35 shows an example of the Search Center.

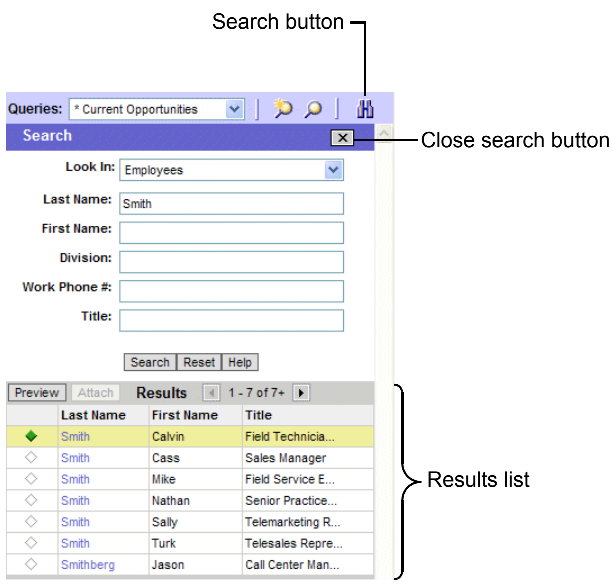



**Figure 35. Search Center**

To close the Search Center, click the close search button.

### *To perform a search*

1. In any screen, click the search button.

   The Search Center appears in a frame to the right of the screen.

2. From the Look In drop-down list, select the type of information you want to find.

   What you choose from the Look In drop-down list will determine the fields that are available to you for entering search criteria.

3. Enter the search criteria.

   **NOTE:** The Siebel application automatically adds a wildcard to the end of your search criteria. This means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe*.

4. Click Search or press the Enter key.

   The records matching the search criteria appear in the Search frame in the Results list.

5. (Optional) Highlight a record in the Results list and click Preview.

   A dialog box containing the detail for the selected record appears.

   **TIP:** You can also drill down on records in the Results list and the record's information will appear to the left of the Search Center.

## Search Operators

Table 16 describes the two wildcard operators you can use to refine your searches.

**Table 16. Search Operators**

| Operator | Description |
|---|---|
| * | Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space. For example, `*rang*` finds *arrange*, *arranged*, *orange*, *orangutan*, *range*, *ranges*, *ranging*, *rang*, *strange*, *stranger, strangest*, *strangle*, *wrangle*, and so on. It is not necessary to put a wildcard at the end of the word; for example, `Siebe` will return *Siebel*. |
| ? | Placed anywhere in a string, returns records containing the characters specified in the string, and also containing any single character at the location of the question mark. For example, `?rag` finds *brag*, *crag*, or *drag*, but not *bragging*. `t?pe` finds *type* and *tape*, but not *tripe*. To find a question mark, precede the question mark with a backslash. Type `\?` to find strings that contain a question mark. |

For more information on the Search Center, see *Siebel Search Administration Guide*.

# Sharing Information 5

This chapter discusses the tools you can use for communicating and sharing information:

# Running Reports

Reports allow you to display key information residing in your system in a predefined, organized format. You can view and print reports in your Siebel application.

You can access reports by choosing View from the application-level menu or by clicking the reports button in the Siebel application toolbar. Most screens provide reports. Different reports are associated with each screen. The particular reports available depend on the current screen.

---

**TIP:** You can limit report data by performing a query before you select the desired report. For more information on performing a query, see "Common Query Tasks" on page 93.

---

Reports are displayed in a browser window, as shown in Figure 36.

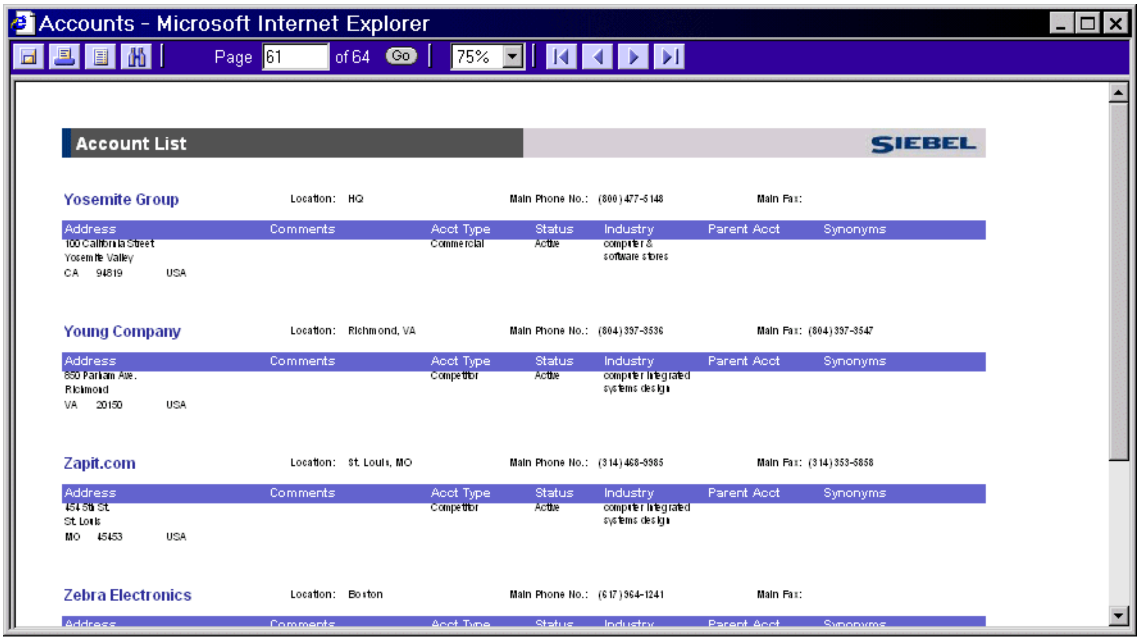



**Figure 36. Report Browser Window - Accounts Report**

***To run a report***

1. Navigate to the appropriate screen.
2. From the application-level menu, choose View > Reports.

   The Reports dialog box appears.
3. From the Select a Report drop-down list, click the desired report.
4. Click Run.

   The report appears in a new browser window.

After executing the report, you will see a variety of controls at the top of the report window, allowing you to print the report and save it. These controls are shown and described in Table 17.

**Table 17. Report Controls**

| Button | Name | Description |
|---|---|---|
|  | Download Report | Provides a dialog box in which you can save or view the report in PDF format. |
|  | Print Report | Provides a printable PDF of the entire report. |
|  | Report Navigation | Provides a table of contents for the report. A viewer appears, listing the sections of the report. Click the name of the section and you will automatically be taken to that section in the window. |
|  | Search | Allows you to search the report. |
|  | First Page | Takes you to the first page of the report. |
|  | Previous Page | Takes you to the preceding page of the report. |
|  | Next Page | Takes you to the next page of the report. |
|  | Last Page | Takes you to the last page of the report. |
|   | Go To Page | Allows you to specify the page you want to go to in the report. Enter the page number in the Page text field and click Go. |

# Emailing, Faxing, Paging, and Wireless Messaging

You can send email, faxes, pages, and wireless messages from within a Siebel application. The record that is active when the Send command is executed determines what information will be sent and what options are available. To find the following commands, choose File from the application-level menu.

- **Send Email.** Allows you to send email directly from the Siebel application.
- **Send Fax.** Allows you to send a fax directly from the Siebel application.
- **Send Page.** Allows you to page someone directly from the Siebel application.
- **Send Wireless Message.** Allows you to send a message to another person's wireless device from the Siebel application.

---

**NOTE:** You may not have access to send functionality, depending on the configuration of your application. See your Siebel administrator for details.

---

***To send an email from your Siebel application***

1. Navigate to the desired screen.
2. Select the record from which you want to send the email. (Depending on the view you are in, data associated with the record may be inserted into the email.)
3. From the application-level menu, choose File > Send > Email.

   ---

   **NOTE:** The Pick Recipients dialog box may appear, depending on the screen you are in when you invoke the Send Email command. If it does, select a recipient from the list (you may select None) and click OK.

   ---

   The Send Email dialog box appears, as shown in Figure 37.

4. Verify that the From field includes your profile name. If it does not, select a profile name from the From drop-down list. If no profile is available, contact your Siebel administrator.

5 Fill in the appropriate fields. You can select a template containing predefined text for the email from the Body drop-down list.

---

**TIP:** You can attach literature and other files to the email by clicking either the add literature or add attachment button. Launching the email from an attachment record automatically attaches the file to the email.

---

**NOTE:** If you attach multiple documents to the email (either literature items or documents), only the last item attached appears in the Attachments field. To see a list of all attached items, click the add attachment button.

---

6 (Optional) If you have selected HTML as your Default Message Format user preference, you can edit aspects of the message text such as font size, font color, paragraph justification, and so on. This formatting will be visible to the email recipient if the recipient's email client software supports HTML. For more information about setting email formatting options, see "Customizing Outbound Email" on page 163. For more information about using the editor, see "Using the HTML Editor" on page 112.

7 (Optional) Click Check Spelling to run a spell check on the text of the email.

**8** Click Send to send the email.

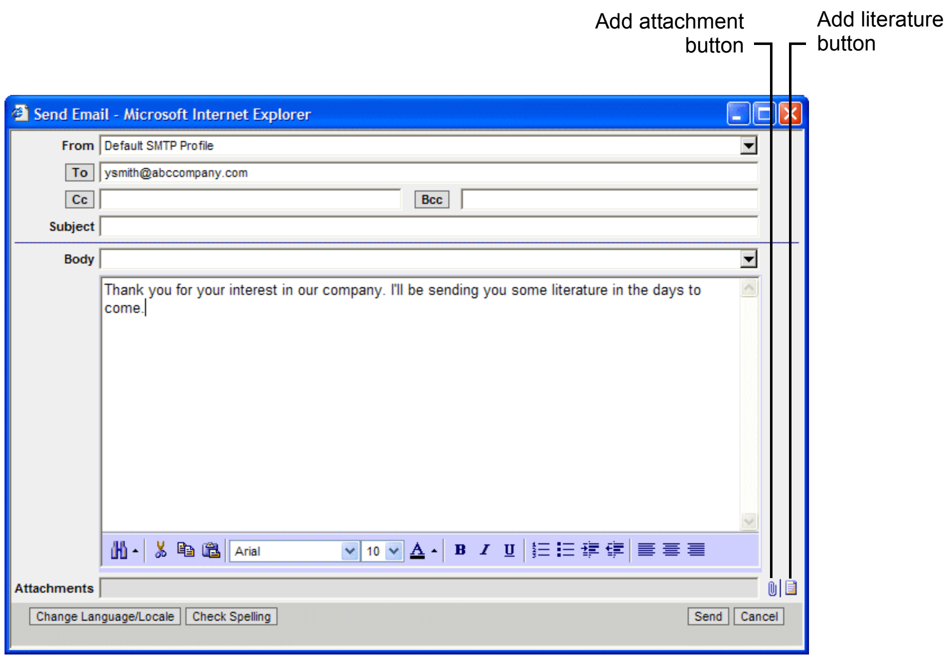



**Figure 37. Send Email Dialog Box**

---

**NOTE:** Sending a fax, page, or wireless message is similar to sending an email. Choose File > Send and the appropriate command from the application-level menu. If you cannot send a fax, page, or wireless message, see your Siebel administrator. You may not have access to these features.

---

For detailed information about Send Email functionality, see *Siebel Call Center User Guide*.

# Using the HTML Editor

Throughout your Siebel application, you may come across various screens in which you can invoke an HTML editor. This editor can be launched from the Send Email dialog box, the Microsite Administration screen, the Group News Administration screen, and the Content Center Administration screen.

---

**NOTE:** Your user preferences must be set up to allow you to use the HTML editor in the Send Email dialog box. For more information, see "Customizing Outbound Email" on page 163.

---

The HTML editor provides special editing controls that allow you to use supported HTML formatting, and also provides some standard editing features such as cut and paste. Table 18 provides an image, name, and description for every button available in the HTML Editor toolbar.

---

**NOTE:** Some buttons may not be available, depending on where in the application you are when you launch the editor.

---

**Table 18. HTML Editor Toolbar Button Descriptions**

| Button | Name | Description |
|---|---|---|
|  | Align Center | Click to center each line of selected paragraphs. |
|  | Align Left | Click to left-align selected paragraphs. |
|  | Align Right | Click to right-align selected paragraphs. |
|  | Bold | Click to apply bold formatting to selected text, or to remove bold. |

**Table 18. HTML Editor Toolbar Button Descriptions**

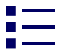
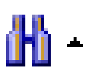
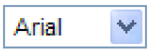
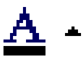
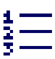
| Button | Name | Description |
|---|---|---|
|  | Bullets | Click to apply bullets to selected text, or to remove bullets. Creates a list of bulleted paragraphs, corresponding to an HTML unordered list. Bullets appear differently at different levels of indenting.<br><br>Note that items that are at the same indentation level within a list must have the same list type, either all items bulleted or all items numbered. List items that are at different indentation levels can have different list types. This means you can nest an indented list of one type (such as a bulleted list) within a list of another type (such as a numbered list). |
|  | Copy | Click to copy selected text to the clipboard. |
|  | Cut | Click to cut selected text to the clipboard. |
|  | Decrease Indent | Click to decrease the indenting for selected paragraphs. |
|  | Embed Image | Click to embed an image in the document. |
|  | Embed Link | Click to embed a link in the document. |
|  | Find/Replace | Click the arrow to the right of the binoculars to display the Find controls. The Find controls appear above the editing bar. Click the arrow on the left side of the Find controls to toggle between Find controls and Find and Replace controls.<br><br>To find specified text, enter the text to find in the Find field, and then click Go.<br><br> <br><br>To replace specified text, enter the text to replace in the Replace field. Enter the replacement text in the with field. If you want to replace all instances of the specified text, check the Replace All check box and then click Go.<br><br>  |

**Table 18. HTML Editor Toolbar Button Descriptions**

| Button | Name | Description |
|---|---|---|
|   | Font | Choose a font from a drop-down menu to apply to selected text. Available fonts include Arial (the default), Verdana, Times New Roman, and Courier. |
|  | Font Color | Click the arrow to display font colors above the editing bar, then click to choose a color to apply to selected text. The line beneath the letter A indicates the currently selected font color. |
|   | Font Size | Choose a size from a drop-down menu to apply to selected text. Point sizes include 8 (the default), 10, 12, 14, 18, 24, and 36. |
|  | Increase Indent | Click to increase the indenting for selected paragraphs. |
|  | Italic | Click to apply italic formatting to selected text, or to remove italics. |
|  | Numbering | Click to apply numbering to selected text, or to remove numbering. Creates a list of numbered paragraphs, corresponding to an HTML ordered list.<br><br>Note that items that are at the same indentation level within a list must have the same list type, either all items bulleted or all items numbered. List items that are at different indentation levels can have different list types. This means you can nest an indented list of one type (such as a bulleted list) within a list of another type (such as a numbered list). |
|  | Paste | Click to paste text from the clipboard into the message area. Depending on the source, text you paste may include HTML formatting. |
|  | Underline | Click to apply underlining to selected text, or to remove underlining. |

# Creating a Siebel Bookmark

A Siebel bookmark is a URL that links to a specific record in the Siebel application. A bookmark included in an email message or document allows a user to click to navigate directly to this record.

***To add a Siebel bookmark to an email or document***

1. Navigate to the record to which you want to create a link and select it.
2. Click the menu button, and then click Get Bookmark URL.

   The Get Bookmark URL dialog box appears.
3. From the Get Bookmark URL dialog box, click and drag the URL icon to the email message or document and drop it there.

   This creates a hyperlink to the Siebel record from the email or document.
4. Click OK in the Get Bookmark URL dialog box to close it.

   Now a user can click the link in the email or document and be taken to the record, so long as the Siebel application is active on their machine.

# Creating Shortcuts to Siebel Records

You can drag a record in your Siebel application to your desktop to create a shortcut. When you have the shortcut on your desktop, you can drag the shortcut to an email message, a document, and so on. A shortcut allows you or another user to click to navigate directly to this record.

***To create a Siebel shortcut on your desktop***

1. Locate and select the Siebel record you want to create a shortcut for.
2. Click the active record indicator and drag the record to your desktop.

   ---

   **NOTE:** To drag the shortcut to your desktop, you will need to resize your Siebel application such that you can see a portion of your desktop. You can then drag the record from your Siebel application to your desktop.

   ---

***To drag a Siebel shortcut from your desktop to another location***

1. If the desired location is not visible, click and drag the record to the location's task bar item at the bottom of the screen.
2. Without releasing the record, pause over the task bar item, and the application will be brought to the foreground.
3. Once the location is visible, move your cursor over the location and release the record.

   A shortcut to the selected record is now created. You can click this shortcut to go directly to this record in the Siebel application. If the Siebel application is not running when you click the shortcut, you will have to log in.

# Importing Data

You can only import data into certain parts of your Siebel application. For example, you cannot import contacts into the My Personal Contacts view.

---

**NOTE:** To import Accounts or Opportunities, see *Siebel Enterprise Integration Manager Administration Guide*.

---

***To import data into the application***

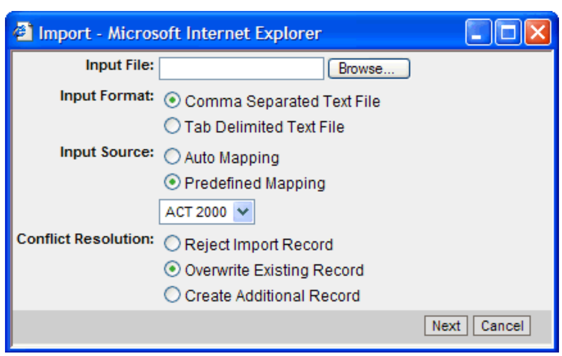
1. Navigate to the screen into which you want to import data.
2. Click the menu button, and then click Import.

   ---

   **NOTE:** You cannot import data from a view tab.

   ---

   The Import dialog box appears.

3. Click Browse next to the Input File field to select the file you are importing.

   The Choose File dialog box appears.

4. Select the file you want to import and click Open.

**5** From the Input Format field in the Import dialog box, select the format of the input source file: Comma Separated Text File or Tab Delimited Text File.

**CAUTION:** The file you are importing has to match the format you select from the Input Format field.

**6** From the Input Source field, select Auto Mapping or Predefined Mapping. Auto mapping uses the structure of the import file to map fields. Predefined mapping uses a set format based on the source application, for example, ACT!. When you select Predefined Mapping you must select the corresponding source from the Input Source drop-down list.

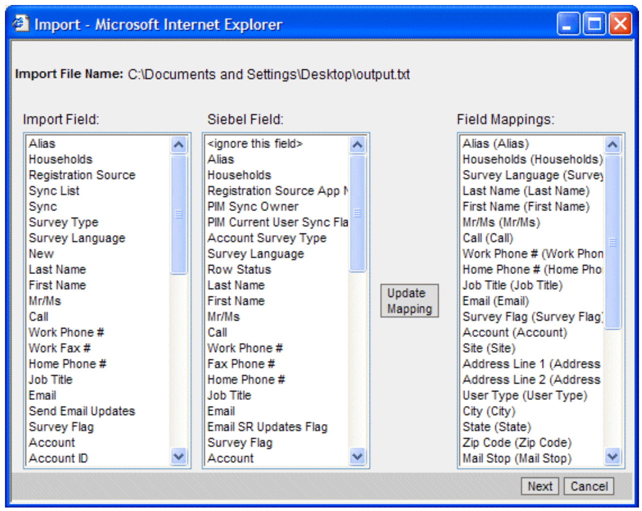
**NOTE:** When importing using Predefined Mapping, you need to have all the fields defined in the Import Object in Siebel Tools. A certain format is required for Predefined Mapping. See your Siebel administrator for details. See *Siebel Tools Reference* for more information about the Import Object.

**7** From the Conflict Resolution Method field, select the method you prefer to use should the import encounter a conflict between records: Reject Import Record, Overwrite Existing Record, or Create Additional Record.

**NOTE:** You can import a maximum of 2,000 records at one time.

**8** Click Next.

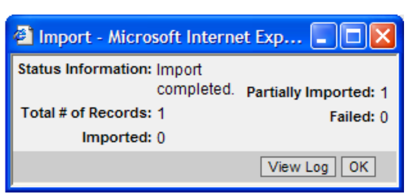
If you chose Predefined Mapping, go to Step 11. If you chose Auto Mapping, the Import mapping dialog box appears.




**9** Verify that the mappings in the Field Mappings list are appropriate. To update a mapping, select the field from the Import Field list, then select the corresponding Siebel field from the Siebel Field list and click Update Mapping. The mapping in the Field Mappings list is updated.

**10** Click Next.

**11** The records from the import file are imported into the Siebel database. When the import is finished, a status dialog box appears.



12. Click OK to close the dialog box or click View Log to review information about the import.

# Exporting Data

The export feature is valuable when you query for specific data and need to export it to a separate file. The exported data in the file can be read in Microsoft Excel or imported into other applications.

If the data you are exporting includes dates or numbers, they will be formatted according to your machine's Regional Settings properties. Your Regional Settings are configured using the Microsoft Windows Control Panel. In some cases, the formatting may depend on the Regional Settings set up by your company on the server. Check with your Siebel administrator.

Exporting is performed from a list, allowing you to export a single record or a list of records.

---

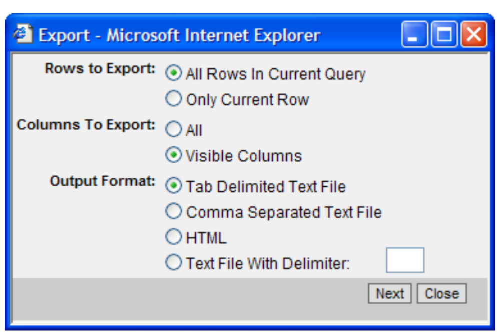
**NOTE:** If a record you export includes a multi-value group field, only the primary value for that field is exported.

---

***To export data to an external file***

1. Navigate or query to get the list of data you want to export.
2. Click the menu button, and then click Export.

   The Export dialog box appears.



3 Use the Rows To Export and Columns To Export option buttons to define which rows and columns you want to export.

4 Use the Output Format option buttons to define the format of the output document.

**NOTE:** To correctly export Siebel data to a Microsoft Excel document, you should use the Tab Delimited Text File option.

5 Click Next.

The File Download dialog box appears.

6 Select Save This File to Disk and click OK.

The Save As dialog box appears.

7 Type the desired filename (indicating the path if necessary).

8 Click Save.

**CAUTION:** Depending on the amount of data you are exporting, this process can take several minutes. *Performance may be affected if you are exporting more than 50,000 records*.

**NOTE:** Only fields exposed in the user interface are available for export from the menu button. If there is a buscomp field that is not exposed in the user interface, it will not be available for export until it is exposed in the user interface.

# Using the Message Bar

The message bar provides a way for administrators and managers to communicate information electronically to their direct reports and to others in the organization.

Broadcast messages appear as scrolling text across the bottom of the application window. The arrows at either end of the message bar control the direction in which the text scrolls. Messages can be displayed in different colors to indicate the importance of each message. Figure 38 shows an example of the message bar.

To fast-forward or reverse through messages, click and hold the arrow keys to the left and the right of the message bar. You can customize the behavior of the message bar in the Message Broadcasting tab in your User Preferences screen. To learn about customizing the message bar, see "Customizing Aspects of the Message Bar" on page 165.


**Figure 38. Message Bar**

# Synchronizing Data

Synchronization is an important process if you are a remote user of the application. You must synchronize on a regular basis to maintain the database on your remote laptop.

The copy of the database that resides on your laptop is generally referred to as a local database. It is an exact copy of the data that resides in the main database on the home server. Your Siebel application is the interface that allows you to add and manipulate information in the database. Using a dial-up connection, you synchronize your local database with the database on the server. This means that you send data to the server and receive data from it. See Figure 39 on page 125.

For example, if you add several new opportunities to your local database, it is important that you sync this information, which is on your laptop, with that on the server. This is your way of backing up the new data to the server. If, on the server, you are added as a team member to a new account, it is important that you sync so that the data for this new account will be added to your local database upon synchronization. For information on setting up synchronization preferences, see *Siebel Remote and Replication Manager Administration Guide*.

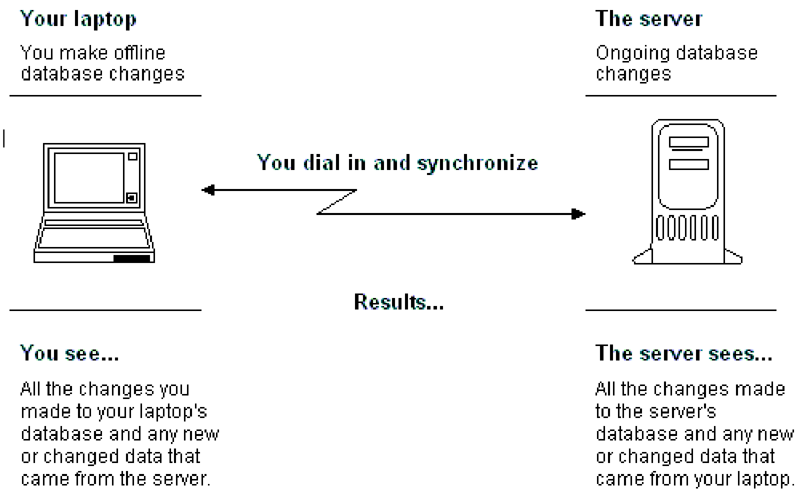
## Overview of the Synchronization Process

The synchronization process is initiated by choosing File > Synchronize > Database from the application-level menu.

You need to synchronize regularly to:

- Make sure your database is as current as possible.
- Make sure the total time to synchronize is as short as possible. The more regularly you synchronize, the shorter the synchronization time will be.

- Share updates with colleagues.




**NOTE:** Synchronizing is your responsibility. You should do it often enough to make sure that the most up-to-date information resides on your laptop. Each organization has its own guidelines for the synchronization process.

## Selecting Contacts and Employees for Synchronization

When you synchronize your PIM with a Siebel application, you can select a query to specify the data you want synchronized. You can select one of the Siebel predefined queries or select a query that was created by your administrator. One of the queries you can use is My Sync List, which synchronizes those contacts and employees you have selected for synchronization. You specify the contacts and employees you want to synchronize in your Siebel application by adding them to a Sync List. Then when you synchronize your PIM, select the My Sync List query and only those contacts and employees you have added will be synchronized.

---

**NOTE:** The My Sync List for the Employees view must be created by your system administrator.

---

Complete the following procedure for each contact or employee you want to synchronize to your PIM.

***To add a contact or employee to the Sync List***

1. In the Contacts or Employees screen, select the record of the contact or employee.
2. Click the menu button, and then click Add to Sync List.

   Your user ID is added to the Sync List field and the Sync check box is checked.

   ---

   **NOTE:** You can remove a contact or employee from your Sync List. If you do, the next time you synchronize, the contact or employee will not be exported to your PIM.

   ---

***To remove a contact or employee from the Sync List***

1. In the Contacts or Employees screen, select the record of the contact or employee.
2. Click the menu button, and then click Remove from Sync List.

   Your user ID is deleted from the Sync List field and the Sync check box is cleared.

# Using the Calendar 6

The Calendar screen allows you to manage your time and scheduled activities. The daily, weekly, and monthly views allow you to choose the visual format that works best for you. In the Calendar screen you can schedule activities, view activities that are scheduled simultaneously, view your tasks in a To Do list, and invite participants to meetings.

You can be in the Activities screen and create an activity with a planned start time, and it will automatically be placed on your calendar. Changing the information for a scheduled activity on the calendar automatically changes the same information in the Activities screen that displays that activity. Similarly, changing information about an activity in any Activities screen changes the same information in the Calendar screen. For more information on activities, see *Siebel Call Center User Guide*.

Calendar views are also available in a number of screens, such as Accounts, Contacts, Campaigns, Projects, and Opportunities. Each Calendar view allows you to create activities without having to go to the Calendar and leave the screen you are in. Calendar views allow you to associate activities with an active record. For example, if you create a new activity in the Calendar view in the Accounts screen, the new activity appears with the Account and Site fields filled in based on the active account record.

You can also run queries for activities from your calendar. To do so, you must first create and save the query from the Activities screen. You can then select the saved query in the Calendar screen from the Queries drop-down list. For more information on creating, saving, and executing queries, see "Common Query Tasks" on page 93.

This chapter discusses "Calendar Views" on page 128 and "Calendar Tasks" on page 133. For information about customizing aspects of the Calendar screen in the User Preferences screen, see "Customizing Aspects of the Calendar" on page 169.

# Calendar Views

As in every Siebel product, the availability of certain features is determined by the configuration of your Siebel application; therefore, the views you see may differ from those described in this discussion of the calendar.

Access the Calendar views by navigating to the Calendar screen and selecting Calendar from the Show drop-down list. To move to a desired Calendar view, click the view’s corresponding tab. See Figure 40 on page 129 for an example of the Calendar screen.

**Daily.** Use the Daily view to see your activities that are scheduled for the selected day.

**Weekly.** Use the Weekly view to see your activities that are scheduled for the selected week. You can switch between a 5 Day Weekly view and a 7 Day Weekly view from the User Preferences screen. For details, see “Setting Up a Default Weekly Calendar View” on page 173.

**Monthly.** Use the Monthly view to see your activities that are scheduled for the selected month. In the Monthly view you can place your cursor over a day to see a full list of the day’s activities.

The Calendar screen also displays a To Do list. Activities appear in your To Do list if you specify them as To Do activities. You can view your uncompleted To Do's in this list. The To Do list is part of the Calendar views, so if you have access to the Calendar views, you have access to the To Do list.

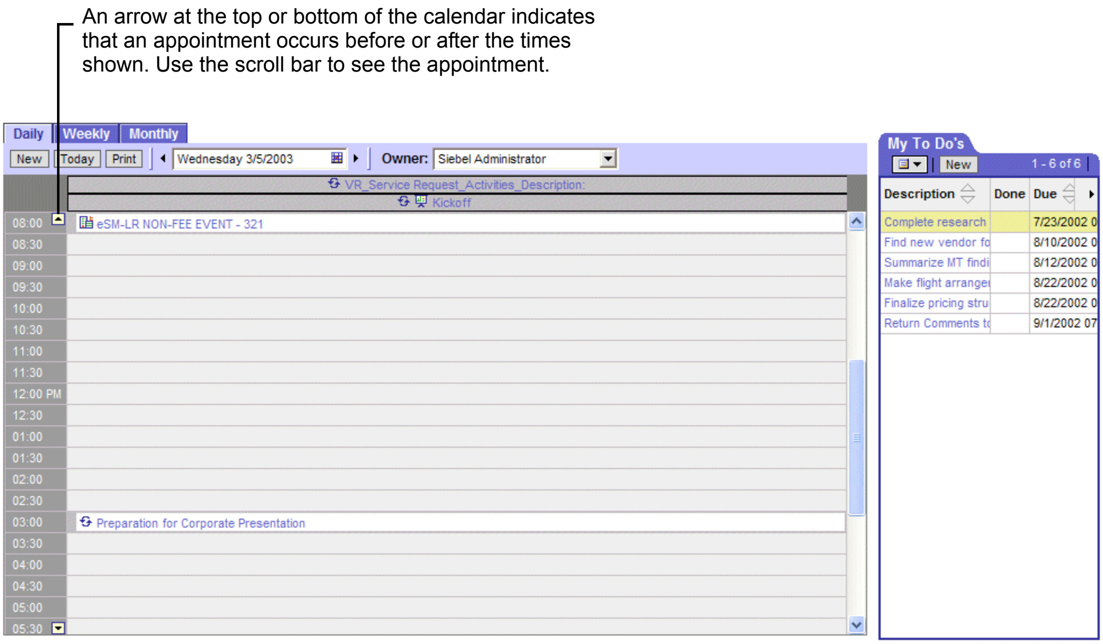



**Figure 40. Calendar Screen - Daily View**

## Viewing Activities

Activities can appear in the Activities screen, in the Calendar, or in the To Do list. The place where an activity appears depends on the place where it is created. Table 19 explains how activities display.

**Table 19. How Activities Are Displayed**

| An Activity created in: | Will automatically appear in: | Comments |
|---|---|---|
| Calendar | Calendar and Activities screen. | However, if you do not specify a start time, the activity will only appear in the Activities screen, and not in the Calendar. |
| To Do list | To Do list and Activities screen. | |
| Activities screen | You must decide where you want to display the activity from the Display In drop-down list. | Your options are Activities Only, Calendar and Activities, or To Do and Activities.<br>If you choose Calendar and Activities but do not assign a start time to the activity, the activity will not appear in your calendar. |

**NOTE:** Activities cannot be displayed in both the Calendar and the To Do list.

For more information about activities and the Activities screen, see *Siebel Call Center User Guide*.

## Calendar Activity Defaults

When you create a new calendar activity, a number of fields will autopopulate with predetermined values. These values are shown in Table 20 as they appear in preconfigured Siebel applications.

**Table 20. Calendar Detail Field Default Values**

| Field | Default Value |
|---|---|
| Duration | Default value as specified in User Preferences screen. |
| End | Start value plus Duration value. |
| Start | Current time rounded up to the next calendar interval. For example, if it is 11:02 A.M. and the daily calendar interval specified in User Preferences is 15 minutes, the start time defaults to 11:15 A.M. (If you created the new calendar activity by drilling into a time value along the left side of the Daily or 5 Day Weekly view, the time will be defaulted based on the value you drilled into, regardless of the current time.) |
| Type | Appointment |

## Recurring Activity Defaults

When you create a recurring activity, the Repeat Until field defaults to a predetermined value based on what you select from the Repeat Frequency drop-down list. You can change this value as desired. Table 21 shows the default values of the Repeat Until field. For more information about creating recurring activities, see "Adding a Recurring Calendar Activity" on page 136.

**Table 21. Repeat Until Default Values**

| If Repeat Frequency value is... | The default Repeat Until value will be... |
|---|---|
| Daily | Today + 7 days |
| Weekly | Today + 90 days |
| Monthly | Today + 6 months |

**Table 21. Repeat Until Default Values**

| If Repeat Frequency value is... | The default Repeat Until value will be... |
|---|---|
| Quarterly | Today + 2 years |
| Yearly | Today + 10 years |

## Calendar Activity Fields

- Selecting a value in the Repeat Frequency field automatically sets a value in the Repeat Until field and determines that the activity is recurring.
- The value in the Start field cannot be greater than the value in the End field.
- If the Alarm check box is checked, and you check the Done check box, the Alarm check box is cleared.

# Calendar Tasks

Throughout your day, you can use your calendar to view activities, add activities, change activities, and delete activities. The following topics describe the steps involved in performing these and other common tasks in your calendar.


- "Viewing Calendar Activities" on page 134
- "Adding an Activity to the Calendar" on page 134
- "Adding a To Do Activity to the To Do List" on page 135
- "Adding a Recurring Calendar Activity" on page 136
- "Deleting a Calendar Activity" on page 137
- "Deleting a Recurring Calendar Activity" on page 137
- "Marking a To Do Activity Complete" on page 138
- "Changing a Calendar Activity" on page 139
- "Changing and Saving a Recurring Activity" on page 139
- "Rescheduling an Activity" on page 140
- "Adding Participants to an Activity" on page 142
- "Removing Participants From an Activity" on page 145
- "Using the Participant Availability Subview" on page 146
- "Reassigning an Activity" on page 148
- "Granting Access to Your Calendar" on page 149
- "Viewing Other Users' Calendars" on page 150
- "Using Group Calendars" on page 150
- "Using Alarms for Activities" on page 151
- "Changing the Date" on page 153
- "Querying Your Calendar" on page 154
- "Printing Your Calendar" on page 154

## Viewing Calendar Activities

You can view and manage activities in the daily, weekly, or monthly view of your calendar.

***To view activities in the daily, weekly, or monthly view***

**1** Navigate to the Calendar screen.

The calendar appears, showing the Daily view.

**2** Click the Weekly or Monthly tab to change the view.

---

**TIP:** In the Daily and 5 Day Weekly views, arrows will appear to indicate that you have appointments that cannot currently be seen in the calendar. You can scroll up or down to view these appointments. Figure 40 on page 129 shows an example of this arrow.

---

**NOTE:** You can specify any of the calendar views as your default view in the Calendar screen. See "Setting Up a Default Calendar View" on page 172.

---

## Adding an Activity to the Calendar

You can add an activity to the calendar from the daily, weekly, or monthly view.

***To add an activity to the calendar***

**1** Navigate to the Calendar screen.

**2** In the Daily, Weekly, or Monthly view, click New. (If you are in the Weekly or Monthly view, you can first highlight a day by clicking on that day. Then, when you click New, the start time will default to the date that you highlighted.)

The Calendar Detail form appears.

**3** Complete the fields.

4. Click Save This One.

   The activity appears in your calendar as long as it has a start time. It also appears in your Activities screen.

***To type an activity directly in the calendar***

1. Click the area of the calendar where you want to create the appointment.
2. Type a description of your appointment.
3. Click away from the text you typed and the appointment will be created.

   **NOTE:** The Daily and 5 Day Weekly calendar views are the only ones in which you can type activities directly into the calendar.

## Adding a To Do Activity to the To Do List

The To Do list appears in the Calendar screen to the right of each calendar view. To Dos are activities that have been marked as To Dos. To Do activities carry forward every day until they are marked complete. To Do activities do not appear in the Calendar itself.

***To add a To Do***

1. Navigate to the Calendar screen.
2. Click New in the To Do list.

   A blank row appears.

3. Enter values in the Description and Due fields. To add further information, drill down on the To Do by clicking the Description hyperlink.

**TIP:** Another way to add a new To Do item is to create an activity and select To Do and Activities from the Display In field drop-down list.

## Adding a Recurring Calendar Activity

You may find that you have to schedule recurring meetings. Instead of adding a new meeting every time it occurs, you can create one activity and set it to repeat at specific intervals.

***To add a recurring activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click New.

   The Calendar Detail form appears.

3. Complete the fields.
4. From the Repeat Frequency drop-down list, select Daily, Weekly, Monthly, Quarterly, or Yearly, depending on how often you want this activity to repeat.

   **NOTE:** See Table 21 on page 131 for details about the Repeat Frequency values.

5. (Optional) In the Calendar pop-up dialog box, from the Repeat Until drop-down list, select the date on which the activity should stop recurring.
6. (Optional) Check the Alarm check box to trigger an alarm for this activity.

   **NOTE:** There is a user preference that automatically turns on the alarm each time you create an appointment. For more information, see "Turning On Alarms for All Calendar Activities" on page 170.

7. Click Save This One.

**CAUTION:** When you modify a repeating appointment and click Save All, the changes you made will be applied to the current appointment and to every future appointment in the series. However, every previous appointment in the series will not reflect the changes.

***To change a recurring activity to a nonrecurring activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. From the Repeat Frequency drop-down list, choose Non-Repeating.
4. Click the Save All button.

   All future instances of the activity are deleted. However, the activity for the current day and previous instances of the activity are not deleted.

## Deleting a Calendar Activity

You can delete an activity from the calendar in any view of the Calendar screen.

***To delete an activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Click Delete This One.

---

**NOTE:** If you are the primary employee for the activity, the activity is deleted from every participant's calendar. If you are a nonprimary employee for the activity, the activity is deleted only from your calendar.

---

## Deleting a Recurring Calendar Activity

When you delete a recurring activity, you can choose to delete just one instance or every instance of the activity.

***To delete one instance of a recurring activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Click Delete This One.

   This instance of the activity is deleted. Every other instance is still scheduled.

***To delete every instance of a recurring activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Click Delete All.

   Every instance of the recurring activity from the current day forward is deleted. Any instances before the current day remain on the calendar.

## Marking a To Do Activity Complete

To Do activities remain in your To Do list and carry forward to each day until they are completed. Use the Done field to mark a To Do as completed. Once an item is marked Done, that item will not appear in the To Do list when the Calendar screen is refreshed. Only uncompleted items appear in the To Do list.

***To mark a To Do as completed***

1. Navigate to the Calendar screen.
2. In the To Do list, select the To Do item you want to mark as completed.
3. Check the Done check box.

## Changing a Calendar Activity

After adding an activity to your calendar, you can go back and make changes to it. You can drill down on the activity and make changes from the Calendar Detail form.

***To change an activity using the Calendar Detail form***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Make the necessary changes and click Save This One.

---

**TIP:** Each time you create or modify an activity in the calendar, you can choose to automatically notify any employees who are associated with the activity. See "Setting Up a Meeting Email Notification Prompt" on page 172 for more information.

---

## Changing and Saving a Recurring Activity

When you change a recurring activity, you must make sure to save it properly. Two buttons on the Calendar Detail form can be used when saving a recurring activity.

- **Save This One.** Saves the changes made to the current recurring activity, changes it to a non-recurring activity, and leaves every other recurring activity in the sequence unchanged. For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you make changes to the August 23 instance of the activity and click Save This One, only the August 23 activity will change. It will also become non-recurring and will no longer be associated with the other activities.

- **Save All.** Saves changes made to the recurring activity and to all subsequent recurring activities in the sequence. However, it does not apply the changes to any activities which are scheduled before the date of the current activity. For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you make changes to the August 23 activity and click Save All, the activities scheduled for August 23, August 24, and August 25 will all be updated with your changes, but the activities scheduled for August 21 and August 22 will remain unchanged.

## Rescheduling an Activity

If you are only rescheduling an activity, you can drag and drop it to a new location, if you are in the Daily view or the 5 Day Weekly view.

**NOTE:** You cannot drag and drop appointments across views. For example, you cannot drag an appointment from the Daily view to the Monthly view.

***To reschedule an activity using drag-and-drop***

1. Navigate to the Calendar screen.
2. Navigate to the Daily or 5 Day Weekly view.

   **NOTE:** It is not possible to drag and drop activities in the 7 Day Weekly view or the Monthly view.

3. Place your cursor over the left edge of the activity.

   A cross with arrowheads appears.

4. Drag the activity to the new time slot and drop it there.

***To reschedule an activity by stretching it***

1. Navigate to the Calendar screen.

**2** Navigate to the Daily or 5 Day Weekly view.

---

**NOTE:** It is not possible to stretch activities from the 7 Day Weekly view or the Monthly view.

---

**3** To change an activity's start time, place the cursor on the activity's top border.

An arrow appears.

**4** Click and drag the activity to an earlier or later location.

**5** To change an activity's end time, place the cursor over the activity's bottom border.

An arrow appears.

**6** Click and drag the activity to an earlier or later location.

# Adding Participants to an Activity

When you add an activity to your calendar, you may also want to have a record of the persons who will be attending or participating in the activity. You do this by adding participants to the activity on your calendar and verifying their availability. Participants can include contacts, employees, and resources such as a projector or a conference room. See Figure 41 for an example of the Calendar Detail form and Participant Availability subview.

**TIP:** If you do not see the Gantt chart in the Participant Availability subview, you may see a large button called Show Participant Availability. Click that to see the Gantt chart. Gantt charts are not available for recurring activities.

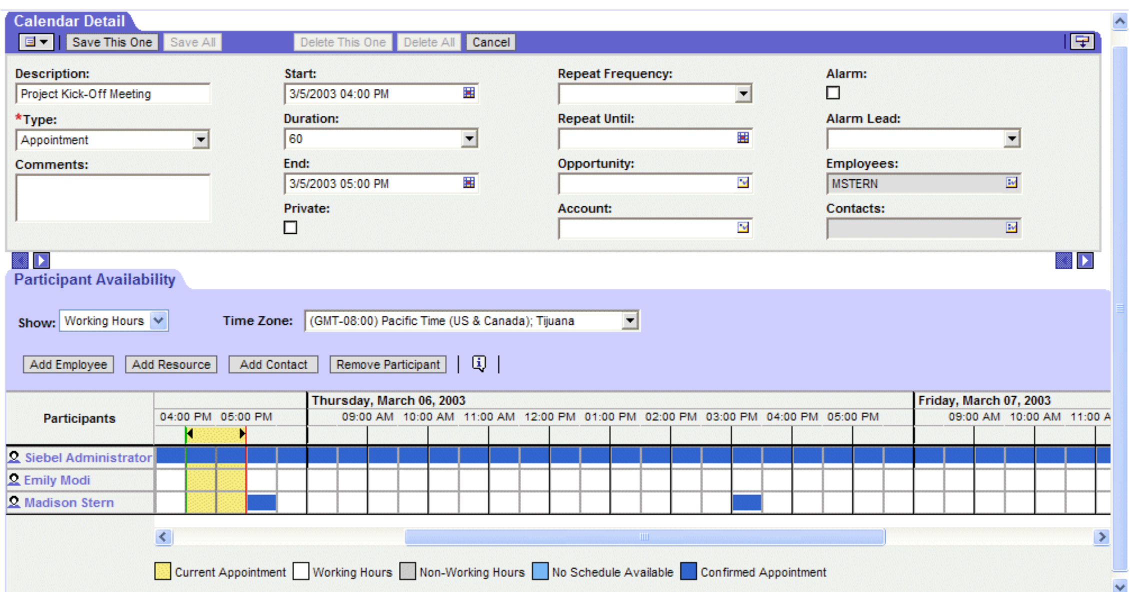



**Figure 41. Participant Availability Subview**

***To add contacts to an activity***

1 Navigate to the Calendar screen.

2 In the Daily, Weekly, or Monthly view, click New.

The Calendar Detail form appears with the Participant Availability view beneath it.

3 Complete the appropriate fields.

4 Click the Add Contact button in the Participant Availability view.

The Contacts dialog box appears.

5 Add a contact by selecting the contact's record.

To select more than one contact at a time, hold down CTRL on your keyboard as you click each record or, if the records are consecutive, click the first record, hold down SHIFT, and click the last record.

6 Click OK when you are finished selecting the contacts you want to add.

The selected contacts appear in the Participant Availability subview and are now part of the activity.

***To add employees to an activity***

1 Navigate to the Calendar screen.

2 In the Daily, Weekly, or Monthly view, click New.

The Calendar Detail form appears with the Participant Availability subview beneath it.

3 Complete the fields.

4 Click Add Employee in the Participant Availability subview.

The Employees dialog box appears.

---

**TIP:** The Query button in the Employees list can be used to find an employee when there are a large number of employees in the organization.

---

5 Add an employee by selecting the employee's record.

To select more than one employee at a time, hold down CTRL on your keyboard as you click each record or, if the records are consecutive, click the first record, hold down SHIFT, and click the last record.

---

**NOTE:** If an alarm is set for this activity, it will go off for all participants on the participant list.

---

6 Click OK when you have selected all the employees you want to add.

The selected employees now appear in the Participant Availability subview and are part of the activity.

7 (Optional) Check the Participant Availability subview beneath the Calendar Detail form to verify an employee's availability.

***To add resources to an activity***

1 Navigate to the Calendar screen.

2 In the Daily, Weekly, or Monthly view, click New.

The Calendar Detail form appears with the Participant Availability subview beneath it.

3 Complete the fields.

4 Click Add Resource in the Participant Availability subview.

The Pick Resource dialog box appears.

5 Query for the type of resource you are looking for. Once records corresponding to your query are returned, select one or multiple records.

6 Click Check Availability in the Pick Resource dialog box.

The records refresh to display only the records that you selected in Step 5. A check mark appears in the Availability column for any resource that is available during the time of your appointment.

7. Select the records, available or unavailable, that you want to add to your appointment and then click OK.

   The resources appear in the Participant Availability subview. A projection screen icon will appear next to each resource to distinguish them from employees and contacts.

---

**NOTE:** You can only add resources to a recurring appointment when you first create it. After you create it, you can no longer add resources since the Gantt chart is not displayed in conjunction with recurring appointments.

---

## Removing Participants From an Activity

You can remove an employee, a contact, or a resource from the Participant Availability view of a nonrecurring activity. You can remove an employee or a contact from a recurring activity from the Calendar Detail form.

---

**NOTE:** You cannot remove a resource from a recurring activity except when you are first creating it since the Gantt chart is not displayed in conjunction with recurring appointments.

---

***To remove a participant from a nonrecurring activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participant Availability subview beneath it.

3. Highlight the participant you want to remove by selecting the row the participant appears in.
4. Click Remove Participant.

   The participant is deleted from the activity.

***To remove an employee or a contact from a recurring activity***

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Click the Employees select button to remove an employee or click the Contacts select button to remove a contact.

   Depending on your selection, either the Employees dialog box or the Contacts dialog box appears.
4. Select the participant you want to remove.
5. Click Delete in the Employees or Contacts dialog box.

   A dialog box appears asking you to confirm the deletion.
6. Click OK to confirm the deletion.
7. Click OK to exit the dialog box when you have finished removing participants from the activity.

   The selected participants are removed from the activity.

## Using the Participant Availability Subview

The Gantt chart, also called the Participant Availability subview, that appears beneath the Calendar Detail form for all nonrecurring activities can tell you a great deal about an activity and its participants. The Participant Availability subview is shown in Figure 41 on page 142. The following are tips to help you get the most out of this subview:

- Click Add Employee, Add Resource, or Add Contact in the Participant Availability subview to add new participants to an appointment.
- Highlight a participant and click Remove Participant in the Participant Availability subview to remove an existing participant from the appointment.

- All the schedules you see in the subview are converted to the time zone specified in your time zone preferences. For example, if your calendar displays Pacific time, and you are viewing an activity involving a user in the Eastern time zone, the Eastern time zone user’s schedule is converted to Pacific time for you. If the Eastern time zone user is looking at the same activity in her calendar, it is converted to Eastern time.
- You cannot use the Participant Availability subview in conjunction with any recurring appointment.
- Employee working hours have a white background. Nonworking hours have a dark gray background.
- Previously scheduled appointments appear as blue blocks on the calendar. The current appointment appears as a band of light yellow framed between a red line and a green line. You can change the start and end times of the current appointment by holding your cursor over the arrow that appears at the top of either line. Click and drag the line to the time you desire.
- Any changes you make in the Participant Availability subview are automatically reflected in the Calendar Detail form. Likewise, any changes you make in the Calendar Detail form are automatically reflected in the Participant Availability subview.
- Contacts appear in the Participant Availability subview, but have no associated schedules.
- Icons are used to indicate the participant type. A face indicates an employee, a phone book indicates a contact, and a projection screen indicates a resource. For more information on the icons used in the calendar, see *Online Help*.
- You can choose to display only your working hours or all 24 hours of the day. To make the choice, select the desired value from the Show field in the Participant Availability subview. You can also set up this preference from the User Preferences screen. For more information, see “Setting Up a Default Participant Chart Display” on page 174.
- Hold your cursor over a participant’s name to find out more information about that participant, including title, account, and time zone.
- You can advance the Gantt chart to a future date by using the horizontal scroll bar at the bottom of the chart. If you want to see more than three days later than the appointment's current date, you must reset the start date in the Calendar Detail form.

## Reassigning an Activity

After creating an activity and adding employees to it, you may find that you need to reassign the activity to a different employee—that is, make a different employee the primary employee for the activity.

***To reassign an activity***

1. Navigate to the Calendar screen.
2. From the Show drop-down list, select Calendar.
3. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participants Availability subview beneath it.
4. In the Employees field, click the select button.

   The Employees dialog box appears. You must change the primary employee to reassign the activity.

   The primary employee appears with a check mark in the Primary field.
5. Check the Primary field in the record of the employee to whom you want to reassign the activity.

   The selected record updates with a check mark in the Primary field. The Primary field in the original record is cleared.
6. Click OK.

   The activity is now reassigned.

7. Remove the previous primary employee from the participant list if that person is no longer involved with the activity.

---

**TIP:** Alternatively, to reassign an activity, you can type the name of the new owner in the Owner field (which is exposed when the Calendar Detail form is displayed in show more mode). The previous owner is deleted from the activity and the new owner you enter is automatically added into the list of employees and designated as the primary employee.

---

## Granting Access to Your Calendar

When working with your team members, you may find that allowing them to see your activities or add activities to your schedule is a good communication tool. To grant other people access to your calendar, simply add members to the Calendar Access List and give them view or update privileges.

***To give others access to your calendar***

1. Navigate to the Calendar screen.
2. From the Show drop-down list, select Calendar Access List.

   The Calendar Access screen appears.
3. Click New.

   The Add Employees dialog box appears.
4. Select an employee by clicking anywhere in the employee record and then clicking OK.

   You are returned to the Calendar Access list. The employee you selected appears in the list and can now view your calendar.

   ---

   **TIP:** Check the Allow Updates field if you want to allow the employee to add activities directly to your calendar.

   ---

## Viewing Other Users' Calendars

You can view only calendars to which you have been granted access. If you are a manager, you can view the calendars of your direct reports.

***To view another user's calendar***

**1** Navigate to the Calendar screen.

**2** From the Owner drop-down list, choose the user of the calendar you want to see.

The calendar refreshes to display the other user's calendar.

---

**TIP:** If your job often requires you to access another user's calendar, you may want to set up that user's calendar as your default calendar. This can be done from the User Preferences screen. For more information see "Setting Up Another User's Calendar as Your Default Calendar" on page 173.

---

## Using Group Calendars

You may need to see certain calendar activities common to all of your colleagues, such as trade shows, training events, holidays, and so on. Your Siebel administrator can create a user representing your group and give you and your colleagues access to it. See your Siebel administrator for details.

## Using Alarms for Activities

Alarms can notify you of the start time for a pending activity. The Alarm check box in each activity record turns on this notification. For alarm notification, a dialog box or pop-up window appears in the Siebel application window at a predetermined interval before the start of an activity. You can snooze the alarm to have it reappear at a specified interval. For more information about snoozing alarms see "Snoozing and Dismissing Alarms" on page 152. If the activity is a recurring one, the alarm appears at the specified time before the start of each instance of the activity. You can specify the time interval at which an alarm will trigger for each activity when you create it. You can also specify one default time interval for all activities. To learn how to specify one default time interval at which an alarm is triggered before all activities, see "Setting Up Default Alarm Times" on page 171.

**TIP:** Alarms are triggered and displayed only if you are logged in to your Siebel application at the time of the alarm. If you log in after an alarm was scheduled to trigger, it triggers when you log in. Also, an alarm does not appear if your Siebel application is not the active application on your desktop when the alarm is due. Instead, you hear the alarm chime and you see a flashing button appear in your taskbar. You can click the flashing button in the taskbar to view the alarm.

**NOTE:** You may not have access to alarm functionality, depending on the configuration of your Siebel application. See your Siebel administrator for more information.

### Setting Alarms

To set an alarm for an activity, check the Alarm box in an activity record on any screen that provides an Activities view or in the Calendar screen.

***To turn on an alarm for a calendar activity***

1. Navigate to the Calendar screen.
2. From the Show drop-down list, select Calendar.

3. In the Daily, Weekly, or Monthly view, click New to add an activity to the calendar.

   The Calendar Detail form appears.

4. Complete the appropriate fields.

5. Check Alarm.

   The Alarm Lead field is automatically populated with the default alarm lead time. You can change this value from the User Preferences screen; you can also manually override it for this appointment only, by entering a new value in the Alarm Lead field.

6. Click Save This One.

   When the alarm pops up, you can choose to dismiss or snooze it.

---

**NOTE:** You may want to have alarms go off for every calendar activity you create. You can do this in the Calendar tab in the User Preferences screen. For more information, see "Turning On Alarms for All Calendar Activities" on page 170.

---

## Snoozing and Dismissing Alarms

When an alarm appears on your screen, you can dismiss it or snooze it. When you snooze it, you can specify how long the alarm will snooze for. An example of an alarm is shown in Figure 42. You can set one default alarm snooze time for all of the activities you create. This can be done in the User Preferences screen. See "Setting Up a Default Alarm Snooze Time" on page 171.

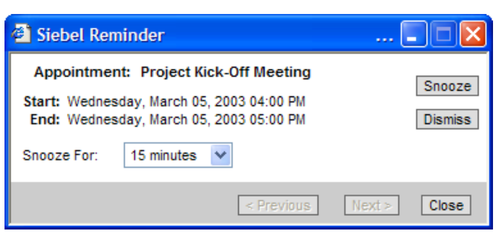



**Figure 42. Siebel Reminder Dialog Box (Alarm)**

***To snooze an alarm when it pops up***

1. In the Siebel Reminder dialog box, from the Snooze For drop-down list, choose the length of time for which you want to snooze the alarm.

2. Click Snooze to defer the alarm.

   The alarm reappears after the amount of time you specified has passed.

***To dismiss an alarm***

- In the Siebel Reminder dialog box, click Dismiss to close the alarm.

  The alarm will not appear again for this activity.

---

**NOTE:** If multiple alarms appear before you have a chance to either snooze or dismiss them, they are all queued behind the same alarm popup. You can click the Previous and Next buttons to move to each one. You can also click Dismiss All to dismiss every alarm that is currently active, or you can click Snooze All to defer every alarm that is currently active.

---

## Changing the Date

You can change the date or time zone in any of the Calendar views. This is helpful if you frequently travel in a number of time zones.

You can change the date in any of the Calendar views.

***To change the date***

- In the current Calendar view, click the arrow to the left of the date field to navigate to an earlier date. Click the arrow to the right of the date field to navigate to a later date. You can also click the calendar select button to launch the calendar dialog box from which you can pick a date.

  The calendar displays activities for the selected date.

---

**NOTE:** You can set a default time zone for your calendar in the User Preferences screen. For more information, see "Time Zone Preferences" on page 161.

---

## Querying Your Calendar

You can run queries for activities in your calendar. To run a query, you must first create and save the query from the Activities screen. You can then select the saved query from the Queries drop-down list in the Calendar screen. For more information on creating, saving, and executing queries, see "Common Query Tasks" on page 93.

## Printing Your Calendar

You can print your calendar in various formats. You can also access calendar reports from the Calendar screen. For more information about reports, see "Running Reports" on page 106.

***To print your calendar***

1. Navigate to the Calendar screen.
2. From the Show drop-down list, choose Calendar.
3. Click the Daily, Weekly, or Monthly tab, depending on which activities you want to print.
4. Click Print.

   The Select Printing Format dialog box appears.

5. Do one of the following:
   - Check the Today's Activities (Calendar Format) option button to print the calendar as you see it. (This option is based on printing from the Daily calendar.)

     **TIP:** Select the landscape mode when printing weekly or monthly reports using the Calendar Format option. This will optimize the appearance of the reports.

   - Check the Today's Activities (List Format) option button to print a report of your activities. (This option is based on printing from the Daily calendar.)

---

**NOTE:** The options shown in the Select Printing Format dialog box change depending on which calendar you are printing from. From the Weekly calendar, you select This Week's Activities; from the Monthly calendar, you select This Month's Activities.

---

**TIP:** If you are using Internet Explorer, you must make sure your Internet options are set up properly or the calendar will not print properly. From the browser toolbar, choose Tools > Internet Options. Click the Advanced tab, and under the Print in IE option, check Print background and images. If you are using Windows 2000, from the browser toolbar choose Tools > Internet Options. Click the Advanced tab, and under the print option, select Print colors and background images.

---

# Customizing the User Interface 7

As with many other Web-based applications, you can customize the appearance and behavior of your Siebel application. Standards are typically set up by your Siebel administrator. However, you can reorganize, rearrange, and customize certain parts of the application. The changes you make will appear only to you.

# Customizing Your Home Page

The home page is the first screen you see when you log in to your Siebel application. An example of the home page is shown in Figure 43.

Your home page shows items that will be most useful to you while you are using the application. For example, your home page can show service requests if you are a call center agent, opportunities if you are a salesperson, or a list of your daily activities. You might also want to see your daily calendar so you can manage your daily appointments.

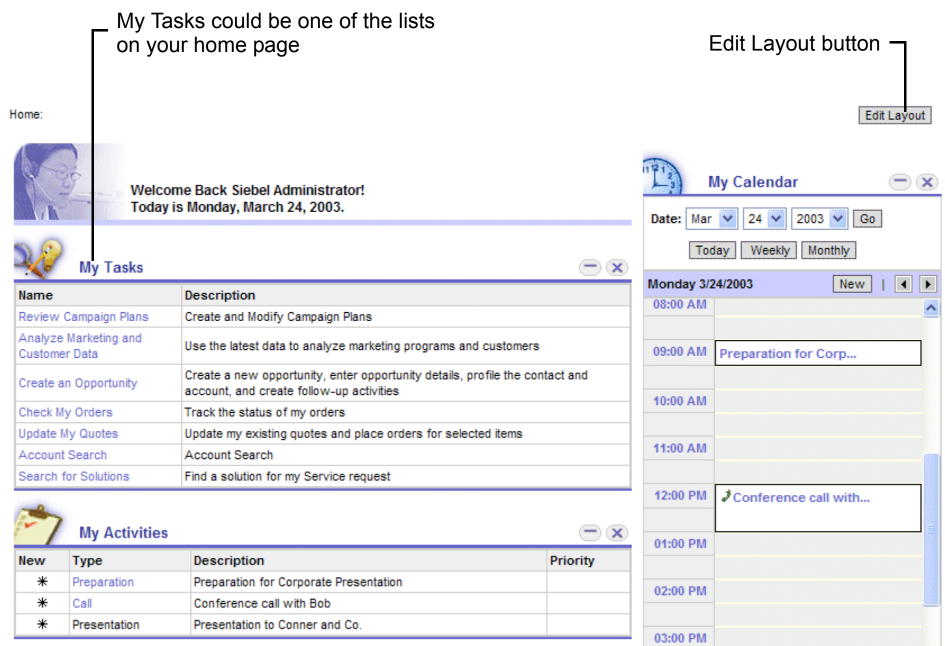



**Figure 43. Home Page Example**

## Using the Home Page Controls

The home page controls are in the top right corner of each section. These controls, shown in Table 22, allow you to manage what appears on the home page. If you use the hide button to remove a section from the home page, you must click Edit Layout to put it back on the home page.

---

**NOTE:** Any changes you make to the home page layout are visible only to you. They are saved and remain in effect until you change them again or revert to the default layout.

---

**Table 22. Home Page Controls**

| Button | Name | Description |
|---|---|---|
|  | Hide | Allows you to temporarily hide a list or form from view on the home page. |
|  | Collapse | Allows you to collapse a list of records. If the list cannot be collapsed, you see the expand button instead of the collapse button. |
|  | Expand | Allows you to expand a list of records. If the list cannot be expanded, you see the collapse button instead of the expand button. |

# Editing the Page Layout

The Edit Layout page gives you access to advanced layout features. You can show hidden lists or forms, collapse or expand each list or form one at a time or all at once, move lists or forms up or down on the page, and revert to the default layout. The edit layout buttons are shown in Table 23. Changes that you make to the layout using this page are saved and will apply in future sessions.

**Table 23. Edit Layout Buttons**

| Button | Name | Description |
|---|---|---|
|  | Collapse | Collapses the list or form. |
|  | Expand | Expands the list or form. |
|  | Move up | Moves the list or form up on the home page. |
|  | Move down | Moves the list or form down on the home page. |
|  | Show | Displays the list or form on the home page. |
|  | Hide | Hides the list or form from view on the home page. |

# User Preferences

You can also customize aspects of the Siebel application through the User Preferences screen. You can access User Preferences by choosing View > User Preferences from the application-level menu or by clicking User Preferences in the Site Map.

Some of the defaults you can view and, in some cases, edit in the User Preferences screen include your password, time zone, calendar, spelling, message bar, default queries, and other items that are related to your particular job. Your access to the functionality in the User Preferences screen depends on how your Siebel application is configured. See your Siebel administrator for details.

**CAUTION:** Some user preferences settings may not take effect until you log out and then log back in to your Siebel application.

## Updating Profile and Behavior Settings

By clicking the Profile tab in the User Preferences screen, you can view your contact information, your position and responsibilities, and other information specific to you. Depending on your access privileges, you may be able to change your password here using the Password and Verify Password fields.

### Time Zone Preferences

You can specify which time zone your Siebel application uses to display date and time fields during your session.

***To set a default time zone***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Profile.

   The Profile form appears.

3. In the Time Zone field, click the select button.

   The Pick Time Zone dialog box appears.

4. Select the desired time zone and click OK.

## Setting a Startup View

If you want, you can determine which screen and view appears when you launch your Siebel application.

***To set a startup view***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Behavior.

   The Behavior form appears.

3. In the Startup Screen field, click the select button.

   The Pick Favorite dialog box appears.

4. From the Startup View list in the Pick Favorite dialog box, select the screen and view you want to have for your startup view.

   For example, choosing Accounts - Activities will show the Accounts screen Activities view when you first launch your Siebel application.

5. Click OK.

   The screen and view you selected appear in the Startup Screen field.

## Modifying the History List

You may want to change the number of threads retained by the History list.

***To modify the History list***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Behavior.

   The Behavior form appears.

3 In the Maximum Threads Saved field, enter the number of threads you want the History list to retain.

## Customizing Outbound Email

You can specify whether you want to format outgoing email using the HTML editor.

***To specify the edit mode of outgoing email***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Outbound Communications.

   The Outbound Communications form appears.

3 From the Default Message Format drop-down list in the Send Email section, select HTML. (If you prefer not to use the HTML editor at all, choose Plain Text.)

---

**NOTE:** For more information about editing outbound email, see *Siebel Call Center User Guide*.

---

## Setting Search Preferences

***To set search preferences***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Search.

   The Search form appears.

3 Make your changes in the Search Settings and Search Term Separator drop-down lists.

**NOTE:** Contact your Siebel administrator for information about the Search Settings values. The default Search Term Separator is OR.

4 To define the proximity of searches that include the NEAR operator, type a number in the Proximity Search field.

For example, to find items within 5 characters of each other when you use the NEAR operator between search terms, type 5 in this field.

## Setting Up Default Queries

Using the Default Queries tab in the User Preferences screen, you can set up queries to appear when you access a specific screen and view. For more information on queries, see "Common Query Tasks" on page 93. For more information about using default queries see, "Using Default Queries" on page 97.

**NOTE:** Only views which can be accessed from the Show drop-down list or the Site Map can have a default query associated with them.

***To set up a default query***

1 From the application-level menu, choose View > User Preferences.

The User Preferences screen appears.

2 From the Show drop-down list, select Default Queries.

The Screen Name and Screen View lists appear.

3 In the Screen Name list at the top of the screen, select the desired screen.

4 In the Screen View list below the list of screens, select the desired view in the View Name column.

5 Click the Default Query field next to the view you selected, and click the select button.

The Pick Query dialog box appears.

6 From the Pick Query dialog box, select the query you want this view to display and click OK.

The selected query appears next to the appropriate view in the Default Query column.

## Running a Spell Check Automatically

You can set up Spell Check to run automatically on any emails, faxes, pages, and wireless messages that you send from the Siebel application. For more information about spell checking, see "Spell Checking" on page 73.

***To automatically spell check outgoing messages***

1 From the application-level menu, choose View > User Preferences.

The User Preferences screen appears.

2 From the Show drop-down list, select Spelling.

The Spelling form appears.

3 Check the Always Check Spelling Before Sending check box.

---

**NOTE:** For more information on setting up spell-check user preferences, see *Siebel Call Center User Guide*.

---

## Customizing Aspects of the Message Bar

You can customize the behavior of the scrolling message bar that appears at the bottom of the application window from the Message Broadcasting tab in the User Preferences screen.

***To customize your message bar***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Message Broadcasting.

   The Message Broadcasting form appears.

3. Edit the fields as desired. The following table describes the functionality of each field.

| Field | Description |
|---|---|
| Scroll Speed | Choose a speed at which messages will scroll across the bottom of the application window: Stopped, Slow, Medium, or Fast. |
| Arrow Scroll Speed | Choose a speed at which messages will scroll when you click the arrows at either end of the message bar: Stopped, Slow, Medium, or Fast. |
| Mouseover Pause Speed | Choose a speed at which the messages will scroll when your mouse cursor hovers over the message bar: Stopped, Slow, Medium, or Fast. |
| Update Interval (Seconds) | Enter the interval of time in seconds at which you want the message bar to refresh. |
| Prefix of Normal Priority Message | You can specify text to appear before a message. For example, you may want to have the letter N appear before a normal-priority message to let you know it is a normal-priority message. This is especially useful if you have trouble distinguishing the colors of these messages. |
| Prefix of High Priority Message | You can specify text to appear before a high-priority message. For example, you may want to have the letter H appear before a high-priority message to let you know it is a high-priority message. This is especially useful if you have trouble distinguishing the colors of these messages. |

| Field | Description |
|---|---|
| Prefix of Urgent Priority Message | You can specify text to appear before an urgent-priority message. For example, you may want to have the letter U appear before an urgent message to let you know it is urgent. This is especially useful if you have trouble distinguishing the colors of these messages. |
| Show | Check this box to show the message bar in the application window. To hide the message bar, clear this box. |

## View Personalization

You can show, hide, and resequence screen tabs and view tabs from the User Preferences screen. You can also set up default views for screens in your Siebel application.

***To show or hide screen tabs***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Tab Layout.

   The Tab Layout list appears.

3. Select the row for the screen tab you want to show or hide and do one of the following:

   - Clear the Hide check box to show the screen tab.
   - Select the Hide check box to hide the screen tab.

**NOTE:** Hiding a screen tab hides all the views within that screen.

***To show or hide view tabs***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Tab Layout.

   The Tab Layout list appears.

3 In the Tab Layout list, select the row for the screen tab associated with the view tab you want to show or hide.

   The View Tab Layout list shows the view tabs for the selected screen tab.

4 In the View Tab Layout list, select the row for the view tab you want to show or hide and do one of the following:

   - Clear the Hide check box to show the view tab.
   - Select the Hide check box to hide the view tab.

---

**NOTE:** The views available to you are always available through the Site Map, whether or not a view tab is hidden.

---

***To change the order in which screen tabs appear***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Tab Layout.

   The Tab Layout list appears.

3 In the Tab Layout list, select the row for the screen you want to reorder, and type a whole number in the Order field to define the position of the screen tab.

---

**NOTE:** If you use the same number in the Order field for more than one tab, the tabs with the same number will appear in alphabetical order. This applies to both screen tabs and view tabs.

---

***To change the order in which view tabs appear***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Tab Layout.

   The Tab Layout list appears.

3 In the Tab Layout list, select the row for the screen for which you want to reorder view tabs.

The View Tab Layout list shows the view tabs for the selected screen.

4 In the View Tab Layout list, type a whole number in the Order field for each view tab to define the position of that view tab.

---

**NOTE:** The Order field defines the sequence of the tabs. The application uses the number in the Order field to resequence the tabs in ascending order. Use whole numbers only. This applies to both screen tabs and view tabs.

---

***To set up a default view for a screen***

1 From the application-level menu, choose View > User Preferences.

The User Preferences screen appears.

2 From the Show drop-down list, select Tab Layout.

The Tab Layout list appears.

3 In the Tab Layout list, select the screen for which you want to set up a default view.

4 In the View Tab Layout list, check the Default View check box for the view you want to have as the default for this screen.

## Customizing Aspects of the Calendar

To better suit your needs, you can customize aspects of your calendar from the Calendar tab in the User Preferences screen. For information on using the calendar, see Chapter 6, “Using the Calendar.”

### Length of the Calendar Day

The Daily view in your calendar shows your default work day, but it may not reflect the hours you are actually at work. You can change the length of the calendar day from the User Preferences screen.

***To change the length of the calendar day***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Calendar.

   The Calendar form appears.

3. Enter the desired calendar start time in the Working Hours Start At field.
4. Enter the desired calendar end time in the Working Hours End At field.

## Default Calendar Activity Duration

Each activity you schedule on your calendar has a default duration. You can determine the default from the User Preferences screen.

***To set up a default calendar activity duration***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Calendar.

   The Calendar form appears.

3. Select the desired activity length from the Appointment Duration drop-down list.

## Turning On Alarms for All Calendar Activities

Alarms notify users of upcoming activities. You can specify that an alarm will be triggered for every calendar activity you create.

***To turn on default alarms for all calendar activities***

1. From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2. From the Show drop-down list, select Calendar.

   The Calendar form appears.

3 Check the Default Alarm check box.

---

**NOTE:** Clear the Default Alarm check box to turn off alarms for all activities. This will affect only activities you create after you clear the Default Alarm check box.

---

## Setting Up Default Alarm Times

From the Calendar tab in the User Preferences screen, you can specify the time at which alarm notification takes place.

***To set the time when alarms appear***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Calendar.

   The Calendar form appears.

3 In the Alarm Lead Time drop-down list, select a time between 5 and 120 minutes.

   This is the time that all alarms will be triggered before an appointment or reminder.

---

**NOTE:** For information about alarm system preferences, see the section on system preferences in *Applications Administration Guide*.

---

## Setting Up a Default Alarm Snooze Time

You can set up one snooze time for all your alarms from the Calendar tab in the User Preferences screen.

***To set up a default snooze time for all alarms***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Calendar.

   The Calendar screen appears.

3 From the Snooze Period drop-down list, select a time between 5 and 120 minutes.

   This is the length of time that alarms will wait before triggering a second time after you snooze them.

## Setting Up a Meeting Email Notification Prompt

You may want to be prompted by the application to send emails to meeting participants when you create a new appointment or modify an existing one. This can be configured from the Calendar tab in the User Preferences screen.

***To set up a participant email prompt***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 From the Show drop-down list, select Calendar.

   The Calendar form appears.

3 Check the Participant Email Prompt check box.

---

**NOTE:** Clear the Participant Email Prompt check box to disable this feature.

---

## Setting Up a Default Calendar View

You can set up a default calendar view to appear every time you access the Calendar screen. For example, if you use the monthly calendar all the time, it will be helpful for you to have the monthly calendar set up as the default calendar view.

***To set up a default calendar view***

1 From the application-level menu, choose View > User Preferences.

   The User Preferences screen appears.

2 Click the Calendar tab.

The Calendar screen appears.

3 From the Default Calendar drop-down list, choose Daily, Weekly, or Monthly.

## Setting Up a Default Weekly Calendar View

Your weekly calendar can be viewed in a five-day or seven-day mode. Switch between the two modes from the Calendar tab in the User Preferences screen.

***To switch between weekly calendars***

1 From the application-level menu, choose View > User Preferences.

The User Preferences screen appears.

2 From the Show drop-down list, select Calendar.

The Calendar screen appears.

3 Choose 5 Day Weekly or 7 Day Weekly from the Weekly Calendar View drop-down list.

## Setting Up Another User’s Calendar as Your Default Calendar

If you spend much of your time accessing another user’s calendar, you may want to set up that user’s calendar as your default calendar.

***To set up another user’s calendar as your default***

1 From the application-level menu, choose View > User Preferences.

The User Preferences screen appears.

2 From the Show drop-down list, select Calendar.

The Calendar screen appears.

3 Click the Default User select button.

The Pick Default User dialog box appears.

4 Select the appropriate user.

5 Click OK.

That user’s login appears in the Default User field and that user’s calendar will appear as your default calendar in the Calendar screen.

### Setting Up a Default Participant Chart Display

In the Gantt chart in the Participant Availability subview, you can choose to display only your working hours or all 24 hours of the day.

***To set up a default participant chart display***

1 From the application-level menu, choose View > User Preferences.

The User Preferences screen appears.

2 From the Show drop-down list, select Calendar.

The Calendar screen appears.

3 Choose Working Hours or 24 Hours from the Participant Chart Display drop-down list.

## Setting Up Synchronization Preferences

You can set synchronization preferences from the DB Synchronization tab in the User Preferences screen. These preferences include enabling autosynchronization, setting its frequency, and setting up autosynchronization reminders. For details on setting up synchronization preferences, see *Siebel Remote and Replication Manager Administration Guide*. For more information about basic synchronization, see “Synchronizing Data” on page 124.

# Keyboard Shortcuts A

You can use keyboard shortcuts to invoke commands and navigate in your Siebel application. They are available in both basic and extended mode.

**Basic mode.** You can use only keyboard shortcuts that are not used by the Web browser in which your Siebel application runs, and you cannot use special keys in the shortcut, such as function and arrow keys.

**Extended mode.** There are no limitations on the keys used in the keyboard shortcuts. This is the default mode.

For more information about basic mode and extended mode, see "Modes of Operation" on page 85.

The shortcuts in Table 24 are shown according to the actions they perform. The context column indicates where in the application each action would be used. Keyboard shortcuts are based on application context. If the corresponding command is not available in the application, the shortcut is not active.

**Table 24. Keyboard Shortcuts**

| Category | Action | Basic Mode | Extended Mode | Context |
|---|---|---|---|---|
| **Data Management** | New record | CTRL + ALT + N | CTRL + N | List, form |
| | Edit record | CTRL + ALT + E | CTRL + E | List, form |
| | Save record | CTRL + SHIFT + S | CTRL + S | List, form |
| | Delete record | CTRL + ALT + D | CTRL + D | Record |
| | Copy record | CTRL + ALT + C | CTRL + B | Record |
| | Select all | CTRL + ALT + A | CTRL + A | List |
| | Undo record | ■ CTRL + ALT + U<br>■ ESC | ■ CTRL + U<br>■ ESC | Record |

**Table 24. Keyboard Shortcuts**

| Category | Action | Basic Mode | Extended Mode | Context |
|---|---|---|---|---|
| **Query Management** | New query | CTRL + ALT + Q | ALT + Q | List, form |
| | Execute query | CTRL + ALT + ENTER | ALT + ENTER | List, form |
| | Refine query | CTRL + ALT + R | ALT + R | List, form |
| | Save query as | CTRL + ALT + S | ALT + S | List, form |
| **General Navigation** | Go to Site Map | CTRL + SHIFT + A | | Application |
| | Go to next record (in list) | CTRL + SHIFT + . | CTRL + down arrow | List |
| | Go to next record set (in list) | CTRL + ALT + . | ALT + down arrow | List |
| | Go to previous record (in list) | CTRL + SHIFT + , | CTRL + up arrow | List |
| | Go to previous record set (in list) | CTRL + ALT + , | ALT + up arrow | List |
| | Go to first record | CTRL + ALT + F | ALT + F | List, form |
| | Go to last record | CTRL + ALT + L | ALT + L | List, form |
| | Open Search Center | CTRL + SHIFT + F | CTRL + F | Application |
| | Run Reports | CTRL + SHIFT + R | | Screen |
| | Go to history button | CTRL + SHIFT + H | | Application |
| | Open applet-level menu | CTRL + SHIFT + M | | List, form |
| | Go to screen tabs | CTRL + SHIFT + T | | Application |
| | Go to view tabs | CTRL + ALT + T | | Application |
| | Go to application-level menu | CTRL + ALT + M | | Application |

**Table 24. Keyboard Shortcuts**

| Category | Action | Basic Mode | Extended Mode | Context |
|---|---|---|---|---|
| **Layout Management** | Advanced sort | CTRL + SHIFT + O | | List |
| | Columns displayed | CTRL + SHIFT + K | | List |
| **Online Help** | About record | CTRL + ALT + K | | Application |
| | Display *Online Help* | CTRL + ALT + H | CTRL + H | Screen |
| | Technical support | CTRL + ALT + J | | Application |
| **Application Management** | Connect | CTRL + SHIFT + W | | Application |
| | Log out | CTRL + SHIFT + X | | |
| | Default action | | CTRL + ENTER | List, form |
| | Synchronize database | CTRL + ALT + 5 | SHIFT + F5 | Application |
| | Refresh browser | CTRL + R | | Application |
| **Communication Management** | New correspondence | CTRL + SHIFT + L | CTRL + L | Record |
| | Send email | CTRL + ALT + 1 | F9 | Record |
| | Send fax | CTRL + ALT + 2 | CTRL + F9 | Record |
| | Send page | CTRL + ALT + 3 | SHIFT + F9 | Record |
| | Send wireless message | CTRL + ALT + 4 | ALT + F9 | Record |

**NOTE:** These keyboard shortcuts come with your Siebel application. If your Siebel administrator has reconfigured these shortcuts, your keyboard shortcuts will be different. Speak to your Siebel administrator if you encounter any difficulties using your shortcuts.

# Query Operators B

When you create a query, you use operators, or conditions, which are used to search the database for matching records. There are two types of query operators:


- "Simple Query Operators" on page 180
- "Compound Query Operators" on page 183

# Simple Query Operators

In Table 25, operators are shown in uppercase; however, query strings are not case-sensitive, and the operators do not have to be in uppercase.

Simple query operators can be used on their own.

**Table 25. Simple Query Operators**

| Operator | Description | Example |
|---|---|---|
| * | Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space. | `*rang*` finds *arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle,* and so on.<br>■ You cannot use * to find dates.<br>■ To find words on more than one line in a field, you should use * to separate the words. You cannot query for control characters or nonprintable characters, such as line feeds (LF) or carriage returns (CR).<br>**NOTE:** If performance is poor when you use the asterisk (*), substitute "IS NOT NULL" in your query. This often improves performance, and will return the same sets of records. |
| ? | Wildcard operator. Placed anywhere in a string, returns records containing the characters specified in the string plus any one additional character which appears at the location of the question mark. | `?rag` finds *brag*, *crag*, or *drag*, but not *bragging*.<br>`t?pe` finds *type* and *tape*, but not *tripe*. |
| " " | Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order. | `"Sun Solaris"` finds records that contain *Sun Solaris* in the query field. |

**Table 25. Simple Query Operators**

| Operator | Description | Example |
|---|---|---|
| = | Placed before a value, returns records containing a value equal to the query value. | `=Smith` finds all records for which the value in the query field is *Smith*. It also turns off wildcards within the query value. |
| < | Placed before a value, returns records containing a value less than the query value. | `<6/20/01` finds all records in which the value of the query field is before 20 June 2001. When entering a date, use the format that is specific to your implementation. |
| > | Placed before a value, returns records containing a value greater than the query value. | `>5/31/01` finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation. |
| < > | Placed before the value, returns records containing a value that is not equal to the query value. | `<>6/20/01` finds all records in which the date in the query field is not 20 June 2001. `<>Paris` finds all the records in which the value in the query field is not *Paris*. |
| < = | Placed before a value, returns records containing a value less than or equal to the query value. | `<=500` finds all the records in which the value in the query field is less than or equal to 500. |
| > = | Placed before a value, returns records containing a value greater than or equal to the query value. | `>=500` finds all records in which the value in the query field is greater than or equal to 500. |
| NOT LIKE, not like | Placed before a value, returns records not containing the value. | `NOT LIKE Smi*` finds all records in which the value in the query field do not start with *Smi*. |
| IS NULL, is null | Placed in the query field, returns records for which the query field is blank. | Enter `IS NULL` in the Due Date query field to find all records for which the Due Date field is blank. |

**Table 25. Simple Query Operators**

| Operator | Description | Example |
| --- | --- | --- |
| IS NOT NULL, is not null | Placed in the query field, returns records for which the query field is not blank. | Enter `IS NOT NULL` in the Due Date query field to find all records for which the Due Date field is not blank. |
| `~` | Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case. | `~LIKE Smi*` finds all records in which the value in the query field starts with *Smi*, *smi*, *SMI*, and so on. Using this operator may affect performance. |

# Compound Query Operators

In Table 26, operators are shown in uppercase; however, query strings are not case-sensitive, and the operators do not have to be in uppercase.

When you perform a compound query, you must use parentheses to control the order in which the search for matching records is performed.

**Table 26. Compound Query Operators**

| Operator | Description | Example |
|---|---|---|
| AND, and | Placed between values, returns only records for which all the given conditions are true. | `*performance* AND *memory*` finds all records that contain both *performance* and *memory* in the query field. |
| OR, or | Placed between values, returns records for which at least one condition is true. | `*performance* OR *memory*` finds all records that contain either *performance* or *memory* in the query field.<br>`performance* OR memory*` finds all records that start with either *performance* or *memory* in the query field. |
| NOT, not | Placed before a value, returns only records that do not contain the value. | `*performance* AND NOT LIKE *memory*` finds all records that contain *performance* but not *memory* in the query field.<br>`NOT (performance OR memory)` finds all records that contain neither *performance* nor *memory* in the query field. |

**Table 26. Compound Query Operators**

| Operator | Description | Example |
|---|---|---|
| () | Surrounds the values and operators that will be processed first, regardless of the default processing order. | `(sun OR moon) AND NOT stars` returns records that contain *sun* or *moon*, but not *stars*, in the query field. |
| LIKE, like | Placed before a value, returns records containing the value. | `(performance* OR memory*) AND LIKE (problem)` finds all records in which the query field starts with *performance* or *memory* and also includes *problem*. Note that the LIKE operator is case sensitive. To find matches regardless of case, see (~). |

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## Symbols



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