



SIEBEL⁷
eBusiness

WHAT'S NEW IN SIEBEL 7:

**A GUIDE FOR END USERS,
MIDMARKET EDITION**

eBUSINESS APPLICATIONS

VERSION 7.0, REV. A

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What's New in Siebel 7: A Guide for End Users MidMarket Edition

Overview

At first glance, the Siebel eBusiness Applications, MidMarket Edition user interface has changed dramatically. This guide for end users has been designed to assist you with the transition from the 6.x to the 7.0 releases, and it works with the other books in the end user category as a companion guide. It provides a general overview of the new look and feel of the Web-based product and some quick tips for understanding its use.

NOTE: All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name will be given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it will be referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to ensure its proper identification and handling.

Release 7.0 runs on a Web browser. If you are an Internet user, or have used Siebel applications previously, making your way around in a Release 7.0 application will soon seem straightforward. You can relate what you know about the Internet or about navigation in previous Siebel versions to the new Release 7.0 interface.

To assist you in this important transition, this guide will address several key tasks performed in 6.x releases and the way they have changed in the 7.0 release.

More detailed explanations of the entire user interface are provided in *Fundamentals, MidMarket Edition*.

Release 7.0 Access Information

You access Siebel Web Client by using a URL address provided by your organization. When you go to the URL, a logon page appears, prompting you to enter your user ID and your password. For assistance with logging on, consult your system administrator. A sample login screen is shown in [Figure 1](#).



Figure 1. Sample Login Screen

Release 7.0 Home Page

After you log in to Siebel Web Client, the first screen you see is your home page, which is similar to the one shown in Figure 2. Your home page consists of a number of areas that show the information that will be useful to you. For example:

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

The information on the home page is determined by your administrator. However, you can show and hide items and rearrange them.

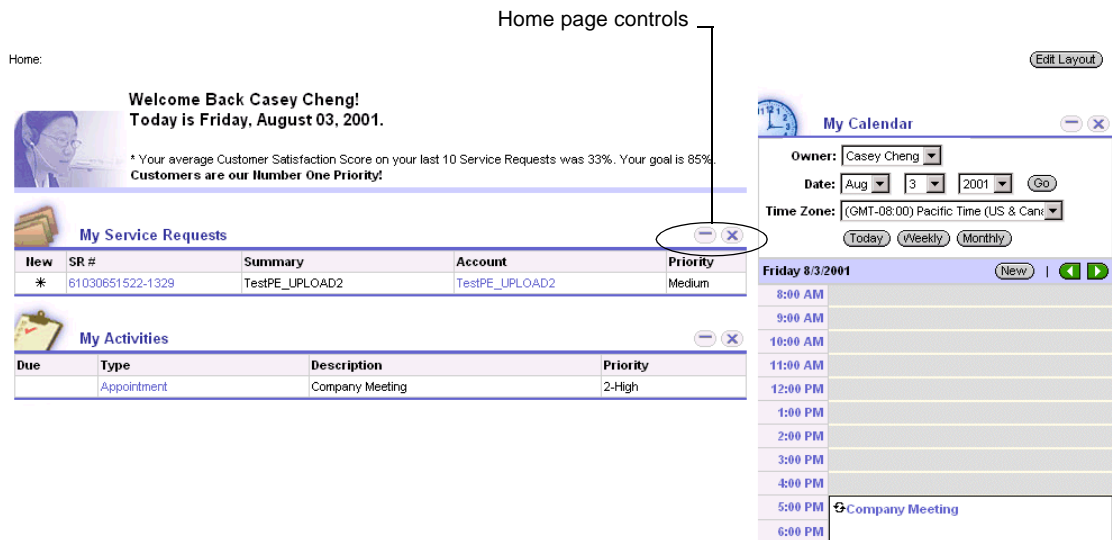


Figure 2. Sample Home Page




Using the Home Page Controls

The home page controls are in the top right corner of each section. These controls, shown in [Table 1](#), allow you to manage what appears on the home page. For example, you can expand and collapse each section using the expand and collapse buttons.

NOTE: If you use the hide button to remove a section from the home page, you must click Edit Layout to restore that section from the Edit Layout page.

Any changes you make to your home page layout will be saved and will remain in effect until you change them again or revert to the default layout.







Table 1. Home Page Controls

Button	Name	Description
	Hide	Allows you to hide a section and remove it temporarily from the home page.
	Collapse	Allows you to collapse the list of records in a given section. If the section cannot be collapsed, you will see the expand button instead of the collapse button.
	Expand	Allows you to expand the list of records in a given section. If the section cannot be expanded, you will 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 sections, collapse or expand all sections one at a time or all at once, move sections up or down on the page, or revert to the default layout. The buttons on the Edit Layout page are shown in [Table 2](#) and an example of the Edit Layout page is shown in [Figure 3 on page 6](#). Changes you make to the layout using this page are saved and will apply to future sessions.

Table 2. Edit Layout Buttons

Button	Name	Description
	Collapse	Collapses the section.
	Expand	Expands the section.
	Move Up	Moves the section up on the home page.
	Move Down	Moves the section down on the home page.
	Show	Displays the section on the home page.
	Hide	Hides the section from view on the home page.

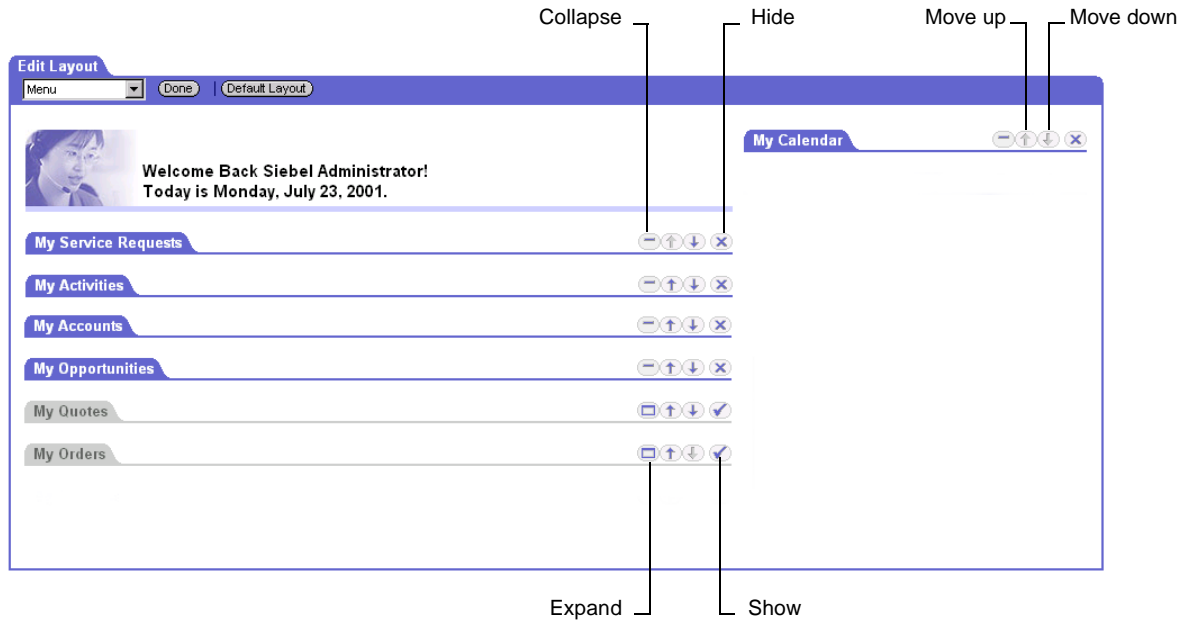


Figure 3. Edit Layout Page

Siebel Application Window

The Release 6.x application window and the Release 7.0 application window look very different. However, if you are familiar with the Release 6.x application window, you will find that they are not as different as they appear.

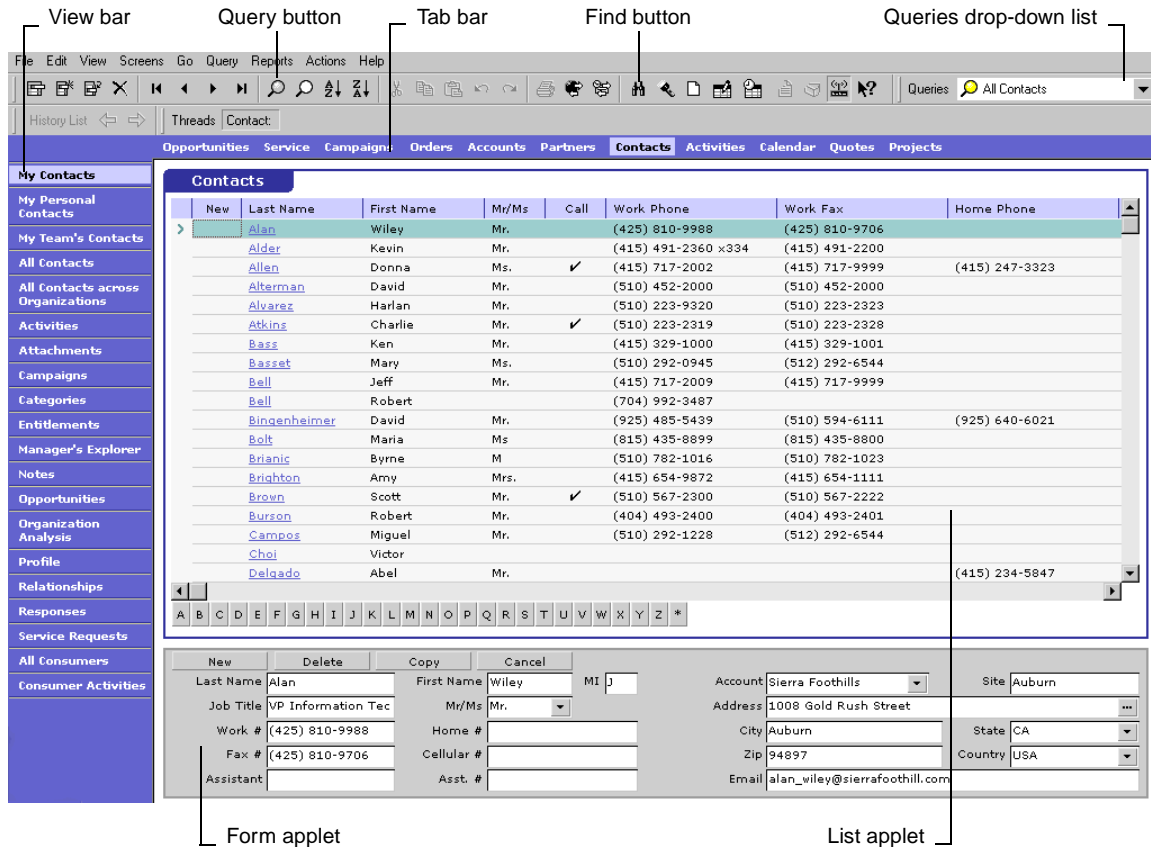


Figure 4. Release 6.x Application Window Example

As you can see in [Figure 5](#), the Release 7.0 interface has some familiar elements in common with the Release 6.x interface, shown in [Figure 4 on page 7](#).

- Both application windows display lists and forms.
- You access each screen by clicking the corresponding screen tab.
- You access each view by clicking the corresponding view name in both Release 6.x and Release 7.0. The only difference now is their location.
- Both application windows contain Queries drop-down lists.

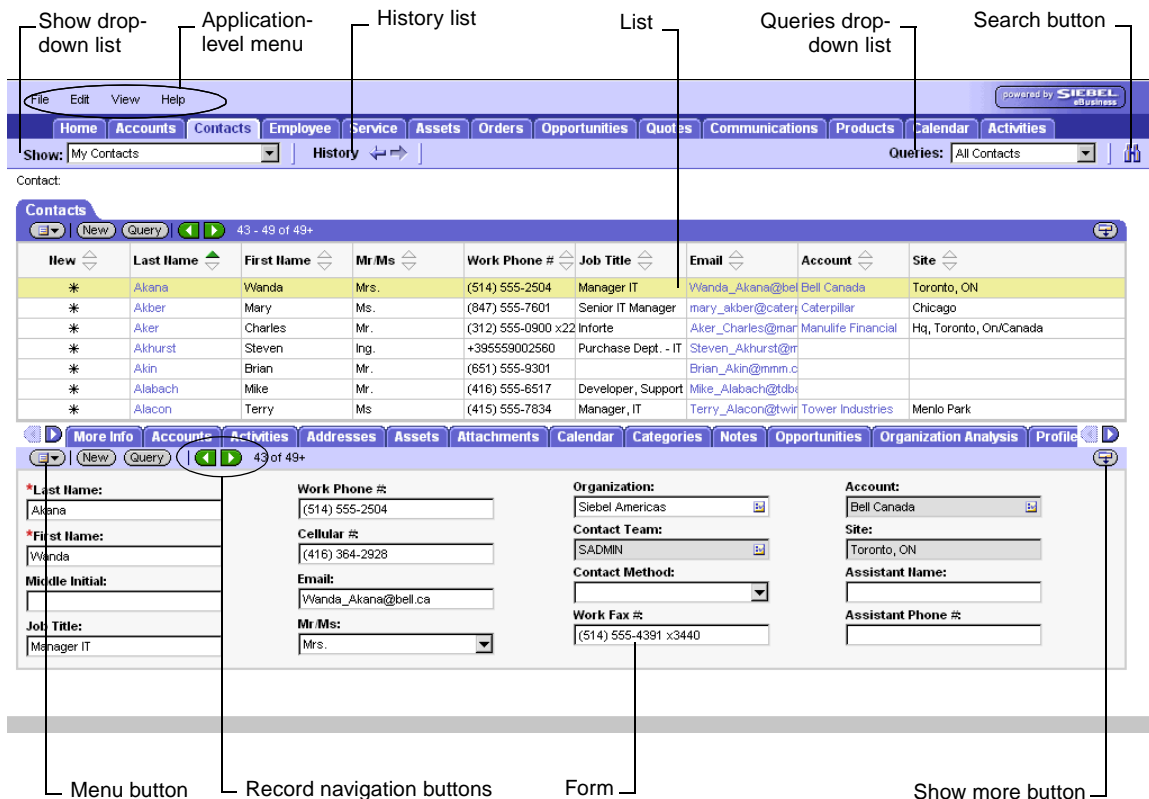


Figure 5. Release 7.0 Application Window Example

Screens and Views

Just as in earlier releases, screens and views are very important in your Siebel application. This section will discuss the use of screens, views, and other features in Release 7.0, such as the Show drop-down list, view tabs, and the menu button.

Release 6.x and Release 7.0 Screen Tabs

Screen tabs perform the same function in Release 7.0 as they did in Release 6.x: Simply click a screen tab to access the related screen. The Release 6.x screen tabs are shown in [Figure 6](#); the Release 7.0 screen tabs are shown in [Figure 7](#).



Figure 6. Release 6.x Screen Tabs



Figure 7. Release 7.0 Screen Tabs

Show Drop-Down List

The Show drop-down list, shown in [Figure 8](#) with the Release 6.x view bar, is a new feature in Release 7.0. It displays the names of filters—such as My Accounts, All Accounts, and My Team’s Accounts—which determine what you see.

For more information about filters, see *Fundamentals, MidMarket Edition*.

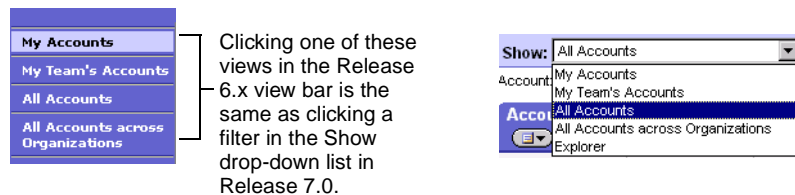


Figure 8. Release 6.x View Bar and Release 7.0 Show Drop-Down List

Release 6.x View Bar vs. Release 7.0 View Tabs

In Release 6.x applications, views were listed in the view bar, on the left side of the screen, as shown in [Figure 8 on page 9](#). In the Release 7.0 interface, views are accessed through a set of view tabs that appear at the top of a view.

The screenshot shows the Siebel 7.0 interface with a navigation bar at the top containing tabs for 'More Info', 'Account Team', 'Activities', 'Addresses', 'Assets', 'Attachments', 'Bill To/Ship To', 'Calendar', 'Categories', 'Contacts', 'Contact Admin', and 'Messages'. Below the navigation bar is a toolbar with 'New' and 'Query' buttons and a status indicator '1 - 7 of 7+'. The main content area displays a table of contacts with the following columns: Item, Last Name, First Name, Mr Ms, Work Phone #, Job Title, and Email. The first row is highlighted in yellow.

Item	Last Name	First Name	Mr Ms	Work Phone #	Job Title	Email
✓	Berner	Michele	Mr.	(203) 555-4100	Pres	
✓	Billing	Antonia	Mr	(203) 555-0232	Dir Bus Solutions	Antonia_Billing@perriergroup.com
✓	Boes	Rodney		(203) 555-0373		Rodney_Boes@perriergroup.com
✓	Candito	John	Mr.	(203) 555-0336	VP, Sales and Oper	
✓	Chapman	Tania	Mr.	(203) 555-7511	CSC Configurator	Tania_Chapman@csc.com
✓	Cross	Kathleen	Mr.	(203) 555-7701	CSC Configurator	Kathleen_Cross@perriergroup.com
✓	Croucher	Ginger	Mr.	(203) 555-0303		

Figure 9. Release 7.0 View Tabs - Contacts View

Site Map

The Site Map is a new feature in Release 7.0. The screen tabs that appear on your screen are determined by your organization and may represent only a subset of the screens that are available to you. To see all your screens, use the Site Map, shown in [Figure 11 on page 11](#). The Site Map provides you with hyperlinks to every screen available to you.

To navigate to a screen using the Site Map

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

The Site Map appears.

- 2 Click the desired screen hyperlink.

The Site Map repositions to display a list of views associated with that screen.

- 3 Click the desired view hyperlink to jump to that screen and view.

The Release 7.0 Site Map shows you the same information that was provided by the Screens menu in a Release 6.x application, shown in Figure 10. The Site Map shown in Figure 11 is a sample only. Your Site Map may look different.

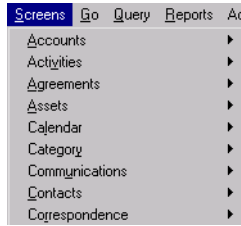


Figure 10. Release 6.x Screens Menu



Figure 11. Release 7.0 Site Map

Saving Data

Your Siebel application allows you to save edits that you make to a record by clicking the menu button and then clicking Save Record. However, even if you do not save the record, the application automatically saves changes when you leave the record. In both cases, the application commits your changes to the database.

Canceling Changes

You can cancel unsaved edits you have made to a record.

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

Show More Button

All forms and lists appear with the show more button in the top right corner. Use the show more button, shown in [Figure 12](#), to expand or collapse the form or list. Expanding a form allows you to look at more or fewer fields in a record; expanding a list allows you to look at more or fewer records in the list, according to your needs.

NOTE: An expanded form shows all the fields of a record. Your system administrator determines what fields appear in the expanded form and in the collapsed form.



Figure 12. Show More Button

Menu Button

The menu button, shown in [Figure 13](#), displays a menu of actions that apply to the active form or list, or to a selected record in a list. You can add, copy, edit, delete, query, determine the columns displayed, and change the sort order using the menu button. Right-clicking in a list or form will provide you with the same menu of actions.



Figure 13. Menu Button

Query Button

The Query button appears on all lists and forms. Click Query to launch a query in a form or a list. For more information on querying, see [“Queries” on page 1-27](#).



Figure 14. Query Button in a List

Queries Drop-Down List

The Release 7.0 Queries drop-down list, shown in [Figure 16](#), is equivalent to the Queries drop-down list in Release 6.x, shown in [Figure 15](#). The Queries drop-down list stores predefined queries established by your organization and any queries you create and save.

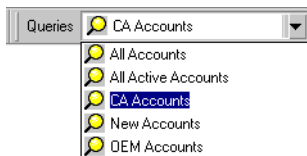


Figure 15. Release 6.x Queries Drop-Down List



Figure 16. Release 7.0 Queries Drop-Down List

History List and Thread Bar

The history list was used in Release 6.x to track the last 25 screens and views you had used. The Release 7.0 History list, shown in [Figure 17](#), stores your most recently visited views, allowing you to navigate back to any of them. The History list is directly to the right of the Show drop-down list.

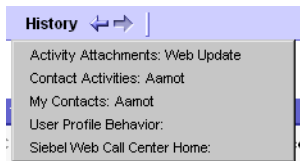


Figure 17. Release 7.0 History List

The thread bar, shown in [Figure 18](#), is still available in Release 7.0. It appears below the Show drop-down list. It helps you keep track of your navigational path when you drill across to a view on another screen. You can return to a previous point in the path by clicking the appropriate name on the thread bar.

[Contact: Adams](#) > [Account:](#) > Opportunity:

Figure 18. Release 7.0 Thread Bar

NOTE: When you navigate to a new screen using a screen tab or the Site Map, the thread bar resets and begins tracking your new path.

Field Control Buttons

In Release 6.x applications, clicking the ellipsis (...) button, shown in [Figure 19](#), caused a dialog box to appear in many cases.

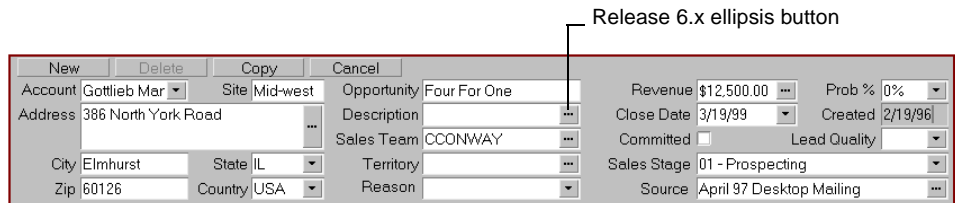






Figure 19. Ellipsis Button

In Release 7.0, several field control buttons, shown in [Table 3](#), help you enter data into fields. When you click one of these buttons, a selection dialog box appears. Selection dialog boxes allow you to enter data in the field, and are specific to the field in which they appear. For example, if you click the calendar button, the Calendar dialog box appears, allowing you to enter date information in a date field.

Table 3. Field Control Buttons

Button	Name/Description
	The calculator button activates a dialog box to assist you with calculating figures.
	The calendar activity button appears in the Calendar screen. This button activates the Calendar Detail form, which allows you to add an activity to the calendar.
	The calendar button provides a dialog box for entering date information in a date field.
	The select button activates a dialog box that allows you to choose from a list of items that are stored in the database. For example, if you click the select button in the Account field, you see the Pick Account dialog box, which allows you to choose from a list of accounts.

As in Release 6.x, a field down-arrow button activates a drop-down list, similar to the one shown in [Figure 20](#). A drop-down list allows you to select information to be entered in the field in which it appears.

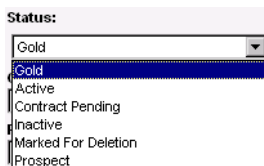


Figure 20. Release 7.0 Drop-Down List

NOTE: A red asterisk beside each required field is a new feature in Release 7.0. A required field is one that must be filled in when you add a record.

User Preferences

In Release 6.x, you were able to customize your application from the Options dialog box which was launched from the View menu. In Release 7.0, you customize your application in the User Preferences screen. You can access the User Preferences screen, shown in [Figure 21 on page 17](#), from the View menu. From the User Preferences screen you can set a startup screen, customize correspondence defaults, choose a default predefined query for a view, and so on.

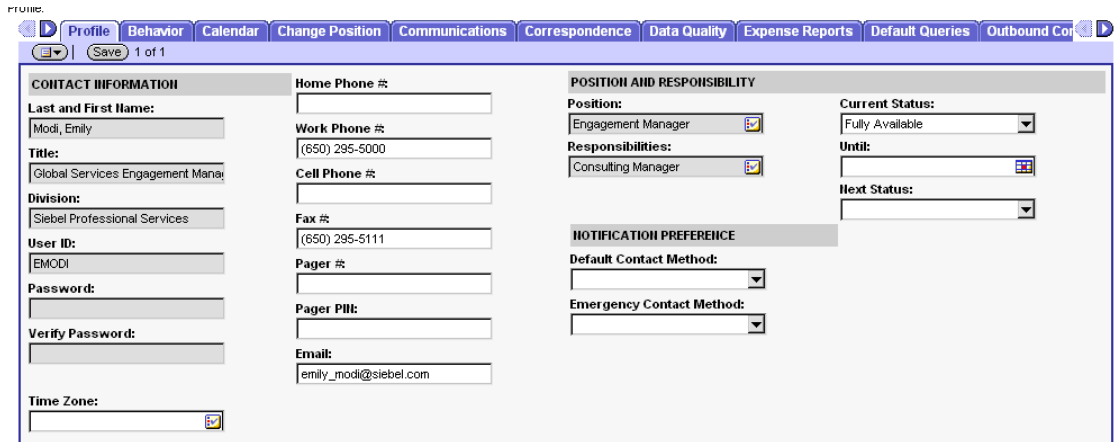


Figure 21. Release 7.0 User Preferences Screen - Profile Tab

New Navigation Techniques

Some navigation techniques have changed with Release 7.0.

Navigating in a List

Navigating in a list has changed slightly in Release 7.0.

Release 6.x Record Navigation

Navigating in a list in Release 6.x was performed by using the up and down arrow keys on the keyboard. You could also use the scroll bar or the alphabet bar, as shown in [Figure 22](#).

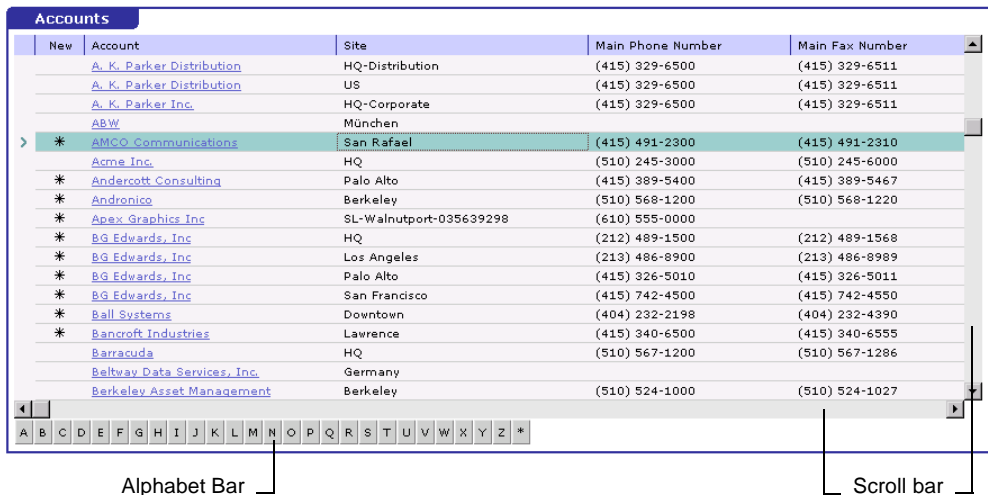


Figure 22. Release 6.x Alphabet Bar and Scroll Bars

Release 7.0 Record Navigation

You perform record navigation in Release 7.0 by using the record navigation buttons at the top of each list or form. When you use the record navigation buttons in a list, you are navigating to a new part of the list. When you use them in a form, you are navigating to the next record or the previous record. The two types of record navigation buttons are shown in [Figure 23](#).



Figure 23. Record Navigation Buttons

NOTE: There is no longer an alphabet bar to search the list by initial letter.

Depending on your configuration, you can activate a record by clicking anywhere in the record. Contact your system administrator if you need more information.

Scroll Bars

Scroll bars are limited in Release 7.0. In Release 6.x, it was common for the user to scroll down through a list. In addition, a record in Release 6.x contained many fields to the far right of the screen, so you had to scroll to the right to see these fields. In Release 7.0, the detail for the selected record is shown in the form below the list.

Keyboard Shortcuts

Keyboard shortcuts were available in Release 6.x and are still available in Release 7.0. However, the keyboard shortcuts used for specific tasks may have changed. [Table 4](#) compares some important Release 6.x keyboard shortcuts with the Release 7.0 keyboard shortcuts. In Release 7.0, there are two types of keyboard shortcuts:

Basic mode. You can only use keyboard shortcuts that are not used by the Web browser in which your Siebel application runs, and you cannot use special keys in a 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.

See your system administrator to determine which mode your Siebel application is operating in.

Table 4. Keyboard Shortcuts Compared

Action	Release 6.x Shortcut	Release 7.0 Shortcut (Basic-Mode)	Release 7.0 Shortcut (Extended-Mode)
New Record	CTRL + N	CTRL + ALT + N	CTRL + N
Delete Record	CTRL + D	CTRL + ALT + D	CTRL + D
Copy Record	CTRL + B	CTRL + ALT + C	ALT + B
Launch <i>Online Help</i>	F1	CTRL + ALT + H	CTRL + H
New Query	CTRL + Q	CTRL + ALT + Q	ALT + Q
Run Query	ENTER	CTRL + ALT + ENTER	ALT + ENTER
Refine Query	CTRL + R	CTRL + ALT + R	ALT + R
Save Query As	CTRL + S	CTRL + ALT + S	ALT + S
Open Search (Find in Release 6.x)	CTRL + F	CTRL + SHIFT + F	CTRL + F
Logout	ALT + F4	CTRL + SHIFT + X	
Send Email	F9	CTRL + ALT + 1	F9
Send Fax	CTRL + F9	CTRL + ALT + 2	CTRL + F9

Table 4. Keyboard Shortcuts Compared (Continued)

Action	Release 6.x Shortcut	Release 7.0 Shortcut (Basic-Mode)	Release 7.0 Shortcut (Extended-Mode)
Send Page	SHIFT + F9	CTRL + ALT + 3	SHIFT + F9
Go to Next Record	CTRL + down arrow	CTRL + SHIFT + .	CTRL + down arrow
Go to Previous Record	CTRL + up arrow	CTRL + SHIFT + ,	CTRL + up arrow

Sorting a Column

In Release 6.x, you selected the column on which you wanted to sort, and then clicked the ascending button or the descending button, shown in [Figure 24](#), to execute the sort.

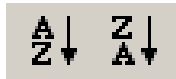


Figure 24. Release 6.x Sort Buttons

In Release 7.0, you can sort directly on each column by using the up and down arrows in the column head. The up arrow indicates ascending order and the down arrow indicates descending order. An ascending sort organizes records from A to Z and from 1 to 9; a descending sort organizes records from Z to A and from 9 to 1. The arrow you select turns green, indicating the direction of the sort. The darker sort indicator shown in [Figure 25](#) indicates an ascending sort.



Figure 25. Release 7.0 Sorted Column Indicators

Columns Displayed

A list consists of many columns, some of which may not be displayed onscreen. Depending on the columns you need to work with, you can add, remove, or rearrange them from the Columns Displayed dialog box, shown in [Figure 26](#).

The Columns Displayed feature can still be accessed using right-click functionality. In Release 6.x you would right-click within the list and select Columns Displayed. In Release 7.0, you can right-click to access the Columns Displayed feature, or you can click the menu button and choose Columns Displayed.

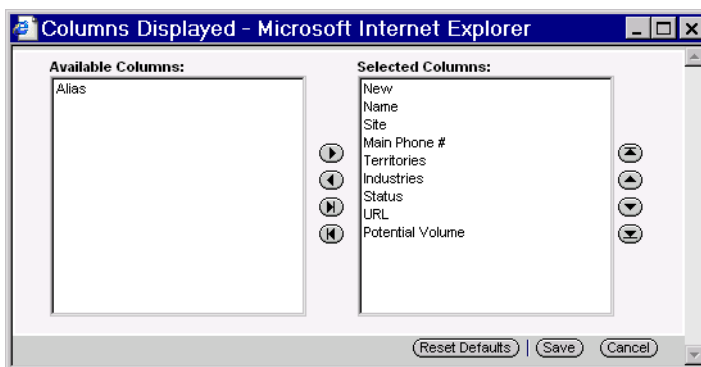


Figure 26. Columns Displayed Dialog Box

To change the way columns are displayed

- 1** In the current list, click the menu button and choose 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 in the center of the dialog box to show and hide the various columns.
- 4** Click Save to execute your changes, or click Cancel to cancel your changes.

For more information about changing the way your columns are displayed, see *Fundamentals, MidMarket Edition*.

Navigating a Chart

In Release 6.x, you accessed charts using the view bar. You now access charts using the Charts view tab. Note that charts may not be available for all screens.

You may have used the toggle button in Release 6.x, shown in [Figure 27](#), to switch between a chart and a list. Release 7.0 has no toggle button. Instead, you use the Show drop-down list in the Charts view, shown in [Figure 28](#), to move among different kinds of charts.

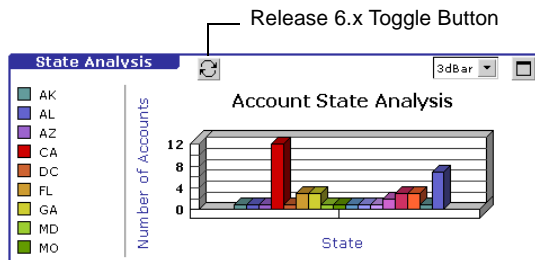


Figure 27. Release 6.x Toggle Button

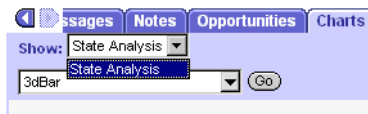


Figure 28. Release 7.0 Charts Show Drop-Down List

Searches

The Search Center is a new feature in Release 7.0. It replaces the Find feature used in Release 6.x. You can now perform a search for anything within your database, no matter where you are located in the application. You can find information without losing the screen you are currently viewing. Searching is similar to querying, except that it is not quite as complex. You would search to find text in the database; you would query to locate multiple sets of data.

Release 6.x Find Command

In Release 6.x, you used the find button or chose Edit > Find to find specific information. You used a dialog box, as shown in [Figure 29](#), to enter the find criteria and you could save the search results in the Queries drop-down list.

In Release 6.x, you could perform a find for an account while you were in the Contacts screen. However, if the account was found, you automatically exited the Contacts screen and went directly to the Accounts screen. Therefore, you could no longer see the screen you had been viewing.

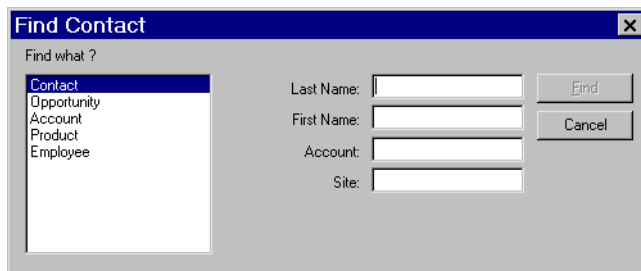


Figure 29. Release 6.x Find Dialog Box Example

Release 7.0 Search Center

Siebel Search allows you to search for information and see the results, without leaving your current screen. You can create searches from anywhere within your Siebel application using the Search Center, shown in [Figure 30](#).

You activate the Search Center by clicking the search button, which looks like a pair of binoculars. You close the Search Center by clicking the close search button.

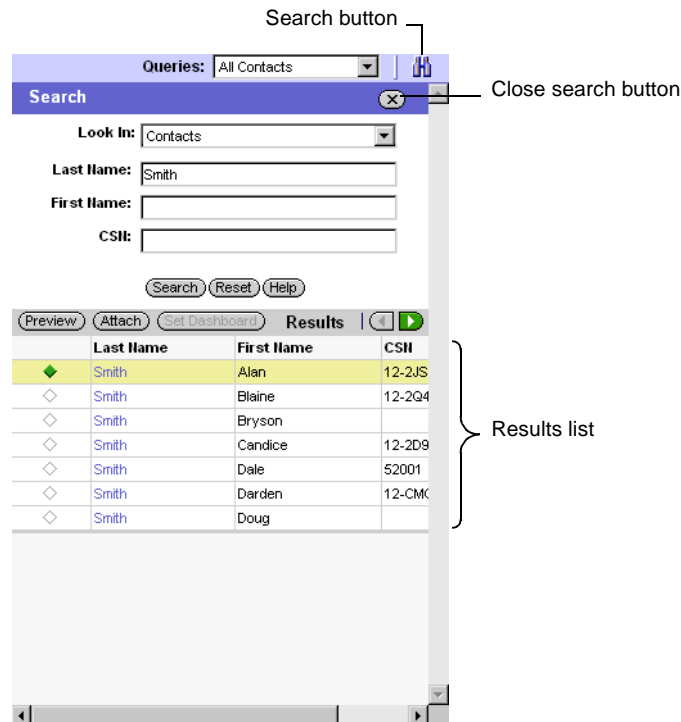


Figure 30. Search Center

You can use two wildcard operators, shown and described in [Table 5](#), to refine your searches.

Table 5. Search Operators

Operator	Description
*	Can be used in words as a wildcard, representing any string of characters. For example, *rang* will return terms such as <i>arrange</i> , <i>arranged</i> , <i>orange</i> , <i>range</i> , and <i>rang</i> . Using Sho* will return words such as <i>Show</i> , <i>Shout</i> , <i>Shore</i> , and <i>Shower</i> .
?	Can be used in words as a wildcard, representing any single character. For example, t?pe will return <i>type</i> and <i>tape</i> , but not <i>tripe</i> .

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** Click the Look In drop-down list and select the type of information you want to find.
- 3** Enter your search criteria and click Search.
The records matching the search criteria appear in the Search Center.
- 4** To preview a record in the list, select the record and click Preview.
A dialog box containing the detail for the selected record appears.



Tip: You can also drill down on the record and the information will appear in a frame to the left of the Search Center.

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

Queries

Querying searches the database for a specific subset of data based on one or more conditions, or criteria. It is more complex than searching; searching is a powerful text-retrieval tool that allows you to perform text searches for data within your application and documents inside and outside your application structure.

The Release 7.0 query feature is similar to that in Release 6.x. Querying is a way to locate one or more records that meet your specified criteria. The records found by a query can be viewed on the screen, exported to a file, and used as data for a report. Release 6.x allowed you to enter query criteria in a list or form and the same is still true for Release 7.0.

You initiated and executed queries in Release 6.x by using the magnifying glass icons on the toolbar. In Release 7.0, you have several options for creating and executing queries.

Creating a Query

- Click Query.
- Click the menu button and choose New Query.
- Choose Edit > Query > New from the application-level menu.

Executing a Query

- Click Go.
- Click the menu button and choose Run Query.
- Choose Edit > Query > Run from the application-level menu.

Saving Queries

Query criteria can still be saved as they were in Release 6.x. You used the Queries drop-down list in Release 6.x to store these saved queries. In Release 7.0, you still use the Queries drop-down list, shown in [Figure 31](#), to store them.



Figure 31. Queries Drop-Down List

NOTE: The Queries drop-down list consists of both predefined and user-defined queries.

Common Query Tasks

The following procedures will provide you with the information you need to perform common query tasks.

To create, execute, and save a new query

- 1** Navigate to the desired screen.
- 2** Click Query in the list or form.
A blank query form or blank row entry in a list appears.
- 3** Enter the query criteria.
- 4** To execute the query, click the menu button and choose Run Query.
The query is executed and the records appear.
- 5** In the application-level menu, choose Edit > Query > Save.
The Query Save As dialog box appears.

- 6** In the Query Name field, enter a name for the query and click OK.
The saved query appears in the Queries drop-down list.

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 choose Refine Query.
- 4** Add and edit the desired criteria.
- 5** Click the menu button and choose 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, containing all user-defined queries.
- 3** Select the query you want to delete in the Query Name list.
- 4** Click OK.

NOTE: For more information about query functionality, see *Fundamentals, MidMarket Edition*.

Additional Release 7.0 Features

The following features are new in Release 7.0.

Spell Checking

Spell Check functionality in Release 7.0 allows you to spell check various items in your Siebel application.

Wherever you see a spell checking button, you may run Spell Check against the text that appears in that record. You may also set up your preferences so that all emails, faxes, or pages you send from your Siebel application are automatically checked for spelling errors before they go out to a recipient. For more information on Spell Check functionality, see *Fundamentals, MidMarket Edition*.

Data Quality

The Siebel Data Quality module helps you maintain the integrity of your information through matching and data cleansing. For more information on Data Quality, see *Fundamentals, MidMarket Edition*.

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