



**SIEBEL**<sup>7</sup>  
eBusiness

**FUNDAMENTALS**

**MIDMARKET EDITION**

***eBUSINESS APPLICATIONS***

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# Additional Documentation

The product documentation set for Siebel eBusiness Applications, MidMarket Edition, is provided on the *Bookshelf, MidMarket Edition* CD-ROM. For general information about Siebel product documentation, see the *Bookshelf, MidMarket Edition* home page, and *Documentation Roadmap, MidMarket Edition*.

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## What's New in This Release

For a list of features new in this release, see the “What’s New” books included on the *Bookshelf, MidMarket Edition* CD-ROM. Your Siebel implementation may not have all the features described in those guides, depending on which software modules you have purchased.

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To help us improve our products, we want to know about any corrections or clarifications to this guide that you would find useful. Please include in your message:

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- The name and version number of the Siebel eBusiness Application you are using
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We appreciate your feedback.

## **Introduction**

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## Siebel Fundamentals

This guide provides you with detailed instructions on how to use the general functionality of any Siebel application. This guide will give you a solid understanding of the Siebel application window elements, the navigation, and how to work with data. You will also learn how to locate the information you need using 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 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* as a convenient source of information. To access *Online Help*, click Help > Contents in the application-level menu. *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 appears, prompting you to enter a user ID and password. Your system administrator can assist you with this task.



**Figure 1-1. Login Screen Example**

---

**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. You are free to add and delete information while becoming familiar with the application in the Sample database.

---

## 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. By defining your responsibilities, the administrator determines what views will be available to you.

A position is the basis for determining what *data* you can access. It is what allows you to see certain records. The position represents an assigned job title within an organization. By assigning you a position (job title), the administrator can determine what set of data you should see. For example, someone who is the North American VP of Sales would see different data than the person who is the 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 only to one person. Only the owner of the record can see it. This type of record is called a personally owned record, since 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 North American region of an organization will see only North America records. Companies with channel partners can also use organizations to partition data, allowing their partners to access only data that they need.

## **Browser Security Settings**

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

## **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.

## **Overview**

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*Getting Started with Your Siebel Application*

# Understanding the Siebel Application Window

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### **About This Chapter**

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 the system.

## Home Page Overview

After you log in to Siebel Web Client, the first screen you see is your home page. Your home page displays lists and forms. Each list or form provides 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 this page is determined by your organization. However, you can remove and rearrange the lists or forms to better manage the information and determine what you see.

See [“Customizing Your Home Page” on page 7-3](#) to learn how to modify your home page.

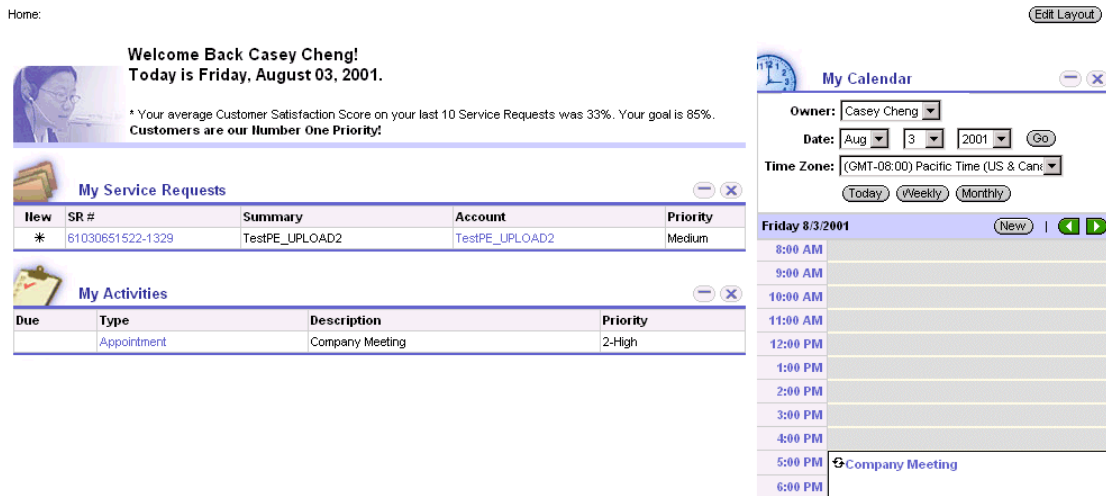


Figure 2-1. Home Page Example

## Siebel Application Window Overview

Figure 2-2 shows important elements of the Siebel application window.

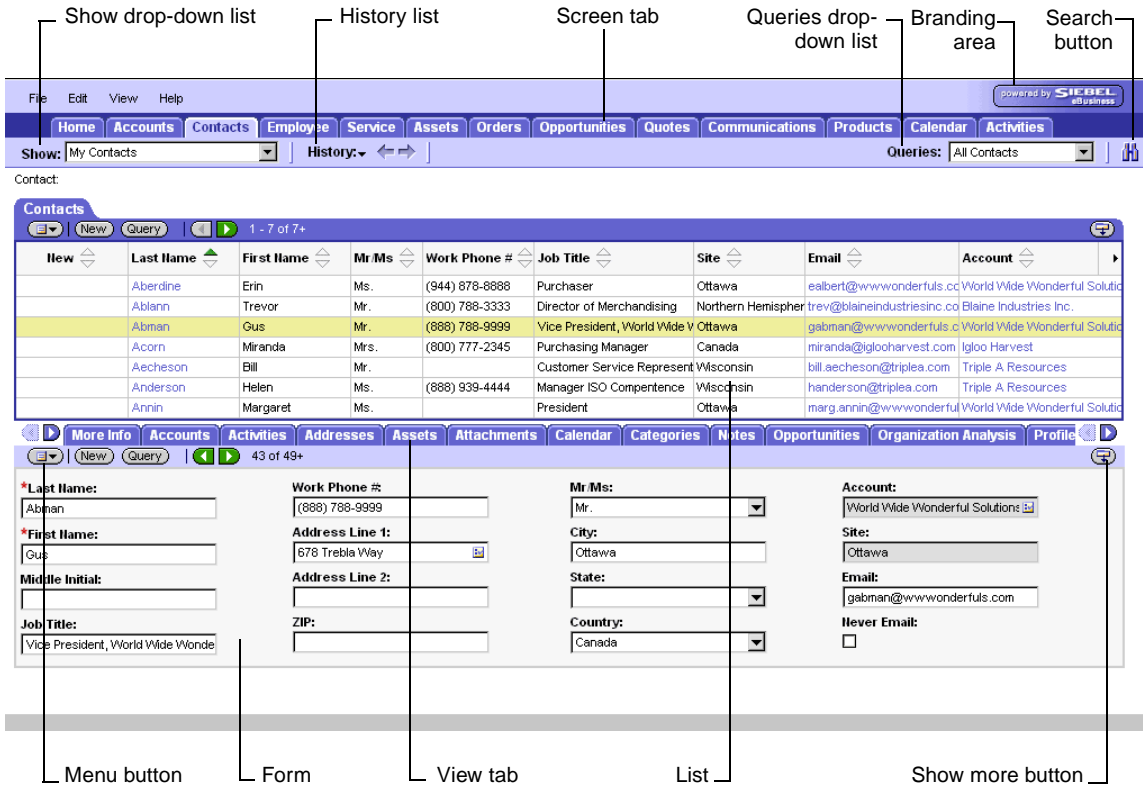


Figure 2-2. Siebel Application Window

## Siebel Application Window Components

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

At the top of the Siebel application window are the application-level menu, the branding area (a link to Siebel's Web site), and the toolbar.

### 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.

---

**NOTE:** The functionality provided by each menu in the application-level menu depends on the application and the configuration you are using.

---



**Figure 2-3. Application-Level Menu**

- **File.** Provides access to communication features, such as correspondence, email, fax, and page; save record functionality; and synchronization and logout.
- **Edit.** Provides access to record and query features.
- **View.** Provides access to the Site Map, reports, user preferences, columns displayed, and advanced sort.

- **Help.** Provides access to *Online Help*, technical support information, and other help features. [Table 2-1](#) provides a brief overview of each command available in the Help menu.

**Table 2-1. Help Menu Commands**

Help Menu Command	Description
Contents	Opens <i>Online Help</i>
Technical Support	Opens the Technical Support dialog box, which provides details about the Siebel application including which 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 Record	Opens the About Record dialog box. For information about the About Record dialog box, see <a href="#">“Spell Checking” on page 3-24</a> .
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.
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, shown in [Figure 2-4](#), shows the Siebel Systems logo. Click the Siebel logo to access the Siebel Web site.



**Figure 2-4. Branding Area**

## Toolbar

The toolbar, shown in [Figure 2-5](#), appears beneath the screen tabs, and displays frequently used tools such as the Show drop-down list, the History list, the Queries drop-down list, and the search button.



**Figure 2-5. Siebel Application Toolbar**

## Show Drop-Down List

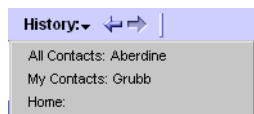
The Show drop-down list, shown in [Figure 2-6](#), displays the names of filters—such as My Accounts, All Accounts, and My Team’s Accounts—which determine what data you see in a screen or a view. For more information about filters, see [“Filtering a Set of Records” on page 2-12](#). The Show drop-down list also acts as a toggle to a different kind of view, such as an Explorer view.



**Figure 2-6. Show Drop-Down List**

## History List

The History list 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 History list in your User Preferences screen. See [“Modifying the History List” on page 7-7](#).



**Figure 2-7. History List**

## Queries Drop-Down List

The Queries drop-down list provides access to your saved queries and 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 [Chapter 4, “Locating Information.”](#)



**Figure 2-8. Queries Drop-Down List**

## Search Button

The search button shows a pair of binoculars. This button is located directly to the right of the Queries drop-down list. 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 4-11](#).



**Figure 2-9. Search Button**

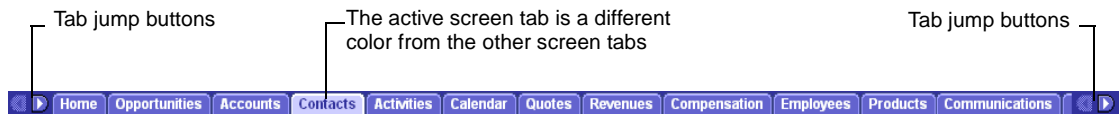
## Screens and Views

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.

### 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 2-10. 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 right and left of the currently displayed tabs.



**Figure 2-11. Tab Jump Buttons**

---

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

---

## 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 every screen available to you, use the Site Map, shown in [Figure 2-12](#). Clicking the desired screen hyperlink repositions the Site Map to display a list of the main views available in that screen. You can then click the desired view to jump to that particular view in the desired screen.



**Figure 2-12. Site Map**



**Tip:** Remember, the Site Map is simply another way to navigate to a screen. You can also navigate to a screen using the screen tabs.

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

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

The Site Map appears.

- 2** Click the desired hyperlink to access the corresponding screen.

The Site Map repositions to display the main views available in that screen.

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

### **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, shown in [Figure 2-6 on page 2-7](#), is used to access a new set of records. Records consist of fields. For example, the fields in a record might show an employee's name, address, employee number, and so on.

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, 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 2-2 provides explanations for each filter in the Show drop-down list. The Accounts screen is used as an example, but each filter can appear in any screen. You may not see some filters shown in Table 2-2, depending on your responsibilities.

**Table 2-2. Show Drop-Down Filters**

Filter	Description
<i>My Accounts</i>	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.
<i>My Team's Accounts</i>	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.
<i>All Accounts</i>	This allows you to see every account in the database to which you have access.
<i>All Accounts across My Organization</i>	This view is usually intended for the CEO of a company so that the CEO can view every account in the database.
<i>All Accounts across Organizations</i>	This view is for companies that have partnerships with other companies. It allows a user with the appropriate responsibilities to see all accounts in all the companies.
<i>View Other's Activities</i>	This view appears in the Activities screen. It allows you to view your own activities, the activities of any direct reports, and the activities of anyone who has 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 Owner drop-down list. If you have access to someone else's activities, you only have read only access regardless of whether or not that user has given you update access in their Calendar Access list.

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 it 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, and 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 2-22](#) 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 [“Chart” on page 2-21](#) 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 2-18](#).

Through the menu button, shown in [Figure 2-13](#), you can perform actions such as copy, edit, delete, query, columns displayed, and advanced sort. Depending on your configuration, the menu button may be replaced by a drop-down list in certain lists or forms. You will recognize it as the menu button replacement because you will see MENU in the drop-down list.



**Figure 2-13. Menu Button**

### Query Button

The Query button, shown in [Figure 2-14](#), appears on all forms and lists. Click Query to launch a blank query in a form or list. For more information about querying, see “Using Queries” on page 4-4.



**Figure 2-14. Query Button**

### 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 2-15](#), to expand or collapse the form or list. Clicking the show more button in a form allows you to look at more or fewer fields; clicking the show more button in a list allows you to look at more or fewer records, according to your needs.



**Figure 2-15. Show More Button**

## Thread Bar

The thread bar, shown in [Figure 2-16](#), 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 appropriate name on the thread bar. When you drill across screens using record hyperlinks, you will remain in the same thread, which means that 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. For example, if you were in the thread seen in [Figure 2-16](#), you would only see 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.

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

**Figure 2-16. Thread Bar**

## View Tabs

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

The view tabs, shown in [Figure 2-17](#), appear in the bottom part of the application below the screen tabs. The list of available views depends on which screen tab you select. Click the 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 will display the contacts associated with this account.



**Figure 2-17. View Tabs**

## Understanding the Siebel Application Window

### Siebel Application Window Components



**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.

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, some of which may not have been 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 lose focus of the selected record when you navigate through the view tabs. This is because some views, such as the Explorer, reset the records upon launch. It may also be the 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 contain subview information. If a view has a subview, it will appear automatically. [Figure 2-18](#) shows the Profile view and the Contacts subview.

The active view tab is a different color from the other view tabs

Subview

The screenshot shows the Siebel application window with the following components:

- View Tabs:** Contact Admin, Messages, Notes, Opportunities, Orders, Organization Analysis, Profile (active), Quotes, Service Profile, Service Requests, Charts.
- Profile View:** A form with fields for Annual Revenues, Revenue Growth Rate, Industry (Tech), Founded (4/17/1999), Total Employees, Employees At Site, Key Competitors, Partners, Public (checked), and Currency (FRF).
- Contacts Subview:** A table with columns: New, Last Name, First Name, Mr/Ms, Work Phone #, Job Title, and Email. It contains two records.

New	Last Name	First Name	Mr/Ms	Work Phone #	Job Title	Email
✓	Abdallah	Trey		(770) 555-4565	Specifications & Order Processing	Trey_Abdallah@aep.com
✓	Abate	Laura		(614) 343-8723	Engineering Mgr	Laura_Abate@aep.com

**Figure 2-18. Profile View and Contacts 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 each of these ways.



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

## Record Navigation Buttons

Use the record navigation buttons at the top of each list or form to navigate records. 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. Depending on where you are in the application, the record navigation buttons may have a different appearance. Both types of record navigation buttons are shown in [Figure 2-19](#).



**Figure 2-19.** Record Navigation Buttons

### List

A list consists of multiple records, presented as rows. Each record consists of multiple fields. A sample list is shown in [Figure 2-20](#).

There may be more records in a list than can be displayed on the screen. Use the record navigation buttons, located at the top of the list, to move up and down through the records.

You can select a record in a list by clicking anywhere in the record. This causes the record to be highlighted and will put the record into edit mode as long as the list is editable.

Record navigation buttons

Show more button

New	Last Name	First Name	Middle Name	Mr/Ms	Work Phone #	Job Title	Email	Account	Site
*	Acey	Mark		Ms.	(617) 555-6767		macey@hotmail.com		
*	Ackerman	David		Mr.	(609) 555-2838	Director of eBusiness	David_Ackerman@bidabike.com	Bidabike	UK
*	Ackerman	Michael			(408) 555-8055	Sales Manager	mackerman@excite.com	Bidabike	UK
*	Acosta	Sally		Ms.	(313) 555-0196	Process Support Manager	Sally_Acosta@ford.com		
*	Adam	Lingle		Ms.	+495559216117	Letterin Vertrieb	lingle_adam@siebel.com	Chase-Flemming	Paris, France
*	Adam	Victor			(770) 555-4870		vadam@yahoo.com		
*	Adams	Betty			(613) 555-4707	Business Consultant	Betty_Adams@bliqu.com	bLiquid.com	Virginia

Figure 2-20. List

## Form

A form displays one record at a time. For instance, in the preceding example you chose the Accounts screen tab to view a list of accounts. When you drill down on an account from the list, you see a form, as shown below, displaying data for the record you selected.

Use the record navigation buttons, located at the top 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 short form, and appear with a red asterisk.

The screenshot shows a Siebel application window with a form for an Order record. The form has a title bar with 'More Info' and several tabs: 'Line Items', 'Terms', 'Payment', 'Attachments', and 'Charts'. Below the tabs are navigation buttons: 'New', 'Query', and '1 of 1'. The form contains the following fields:

- \*Order #:** 1-2241101
- \*Type:** Purchase Order
- Account:** Siebel Systems, Inc.
- Site:** HQ
- Priority:** Medium
- \*Status:** Open
- Last Name:**
- First Name:**
- Team:** SADMIN
- Organization:** Default Organization
- \*Currency:** USD
- Price List:**
- Description:**
- Opportunity:**
- Quote #:**
- SR #:**

A 'Show more button' is indicated by a line pointing to a button in the top right corner of the form.

Figure 2-21. Form

### Chart

Data can also be displayed in a chart. Charts are graphical representations of data and are available as views in a number of screens. Charts are used to compare data sets.

Use the Show drop-down list in the Charts view to determine which data is being represented in the chart. This allows you to toggle between data sets. Most chart 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.

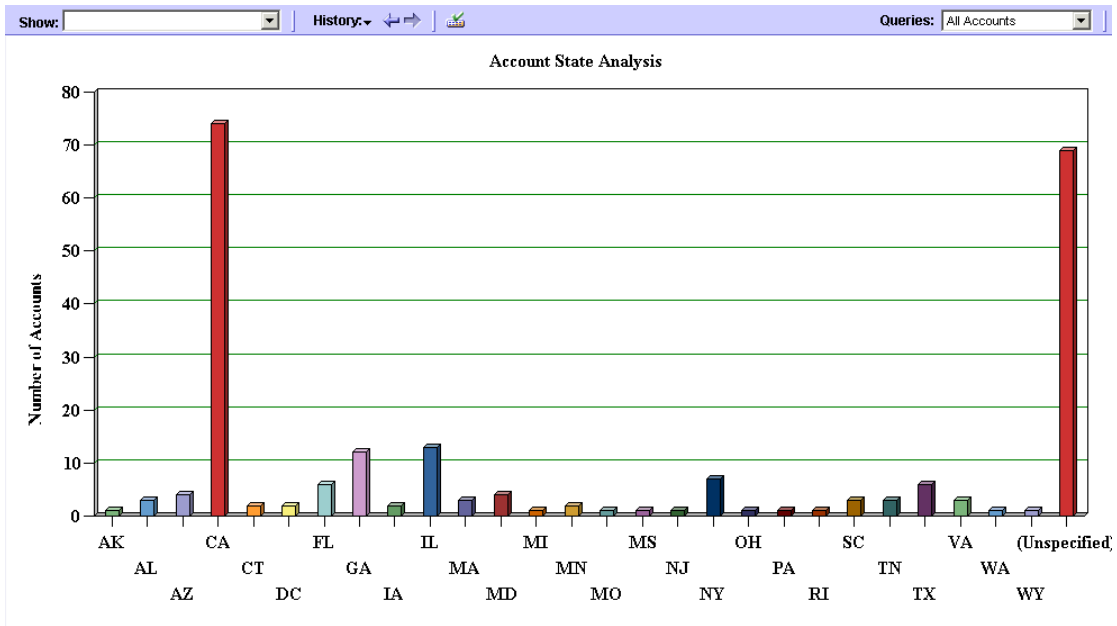


Figure 2-22. Charts View

You can copy and paste a chart from your Siebel application into another application. For example, you may want to include some charts in a Microsoft PowerPoint presentation. To do so, select the chart and press CTRL + C. You can then paste the chart directly into your PowerPoint slide.

---

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

---

## **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.

The Explorer 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 can be seen in the section to the right.

## Understanding the Siebel Application Window

### Displaying Data

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.

The screenshot shows the Siebel Explorer View. On the left is a folder tree under 'Opportunities'. The 'Air Seats' folder is selected and expanded, showing a list of sub-folders including 'Opty - PLM 10770', 'Siebel CTI product cross-sell Partner', 'Air Quality Seats', 'BG 1111', 'TESTREVSS', 'TSE TEST', and several 'seats of eService through MidM' folders. On the right is a data table titled 'Opportunities' with columns: Name, Account, Primary, Revenue, Sales Stage, and Close Date. The table contains 7 rows of data.

Name	Account	Primary	Revenue	Sales Stage	Close Date
Air Seats	Quality Air	SADMIN	\$1,700,000.00	01 - Prospecting	11/3/2001
Opty - PLM 10770	Collins Pharmaceu	SADMIN	\$1,500,000.00	01 - Prospecting	11/3/2001
Siebel CTI product c	Saxo Bienvenue FR	SADMIN	\$1,372,410.00	02 - Potential Lead	11/3/2001
Air Quality Seats	Air Quality	SADMIN	\$1,000,000.00		11/3/2001
BG 1111	Bg Inc	SADMIN	\$350,000.00	02 - Qualification	11/3/2001
TESTREVSS		SADMIN	\$0.00		11/3/2001
TSE TEST		SADMIN	€0.00		11/3/2001

Figure 2-23. Explorer View

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## **About This Chapter**

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 or it can be displayed individually in a form.

In some situations you will not be able to see all the fields belonging to a record. This may be because you are viewing the record in a list where all fields cannot be displayed due to space, or you are viewing the record in a collapsed form. To view all fields in a record, drill down on it in a list or click the show more button in the top right corner to expand the form if it is collapsed. For information about drilling down on a record, see [“Using Record Hyperlinks” on page 3-13](#). For information on the show more button see [“Show More Button” on page 3-11](#).

New	Last Name	First Name	Mr/Ms	Work Phone #	Job Title	Email	Account	Site
	Aamot	Gina	Mr.	(614) 343-8700	IT Manager	Gina_Aamot@aep.com	AEP Communications	Columbus, OH
*	Abanilla	David	Mr.	(614) 343-8732	Proj Leader-Architecture	David_Abanilla@aep.com	AEP Communications	Columbus, OH
*	Abate	Laura	Ms.	(614) 343-8723	Engineering Mgr	Laura_Abate@aep.com	AEP Communications	Columbus, OH
*	Abboline	Glen	Mr.	(650) 295-5000	Global Services Associate	glen_abboline@siebel.com	eBusiness Beratung	Berlin, Germany
*	Abdallah	Trey		(770) 555-4565	Specifications & Order Proc	Trey_Abdallah@aep.com	AEP Communications	Columbus, OH
*	Abel	Robert	Mr.	(860) 555-5186	Assistant Director	Robert_Abel@aep.com	AEP Communications	Columbus, OH
*	Abelman	Brent	Mr.	(650) 549-7311	Proj Mgr	babelman@atb.com	Alberta Treasury Branches	San Mateo

Figure 3-1. 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 multi-value 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. When in a form, you'll see the field control if one is available. When in a list, you won't see a field control until you click in a field which contains a field control.

---

**NOTE:** A field that has a red asterisk beside it is a required field. You cannot save a record until its required fields contain information.

---

## Text Fields

This type of field allows you to use your keyboard to type text directly into the field. Simply click within the field and begin typing.



**Figure 3-2. Text Field**

If a field has a gray background, the field is read-only and the content cannot be changed.

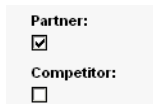
---

**NOTE:** Many text fields will only hold a specific number of characters. The allowable number varies throughout the application.

---

## Check Boxes

Check the box next to an option to select it. A check mark or an “x” appears in the box. If you click the box again, the check mark or “x” disappears. You may select multiple options in this manner.



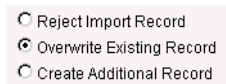
Partner:

Competitor:

**Figure 3-3. 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.



Reject Import Record  
 Overwrite Existing Record  
 Create Additional Record

**Figure 3-4. Option Buttons**

## Currency Calculator

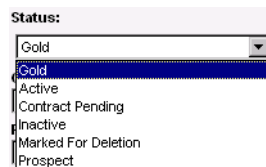
This control is a calculator button that appears next to a currency field. When you click the button, a pop up appears in which you can specify financial transaction information in foreign currencies. You can specify the country of origin, the date on which the transaction occurred, and calculate mathematical operations.

**Table 3-1. Currency Calculator Field Controls**

Field Control	Description
Currency select button	Use this button to launch a dialog box in which you can select the country and currency code.
Exchange date calendar button	Use this button to pick the exchange date in the pop up calendar.
Amount calculator button	Type the currency amount in the Amount field, or use the pop up calculator to enter the amount.

## Drop-Down List

A drop-down list allows you to click a down-arrow button to the right of a field in order to select from a list of available values.







**Figure 3-5. Drop-Down List**

## Field Control Buttons and Selection Dialog Boxes

The field control buttons shown in [Table 3-2](#) appear in many fields. When one of these buttons is selected, a selection dialog box appears. A selection dialog box allows you to enter data that is appropriate to the field.

**Table 3-2. Field Control Buttons**

Button	Name/Description
	The calculator button activates a selection dialog box to assist you with calculating figures.
	The calendar activity button appears in the Calendar screen. This button activates the Calendar Detail form, allowing you to add an activity to the calendar.
	The calendar select button activates a selection dialog box for entering a date in a date field.
	<p>The select button appears next to fields that provide selection dialog boxes. Selection dialog boxes allow you to choose from a list of items that are stored in the database, or add new items (in some cases). For example, if you click the select button next to the Account field, the Pick Account dialog box appears, allowing you to choose from a list of accounts.</p> <p>This type of field control is also used for multi-value group fields, allowing you to choose multiple values for one field.</p>

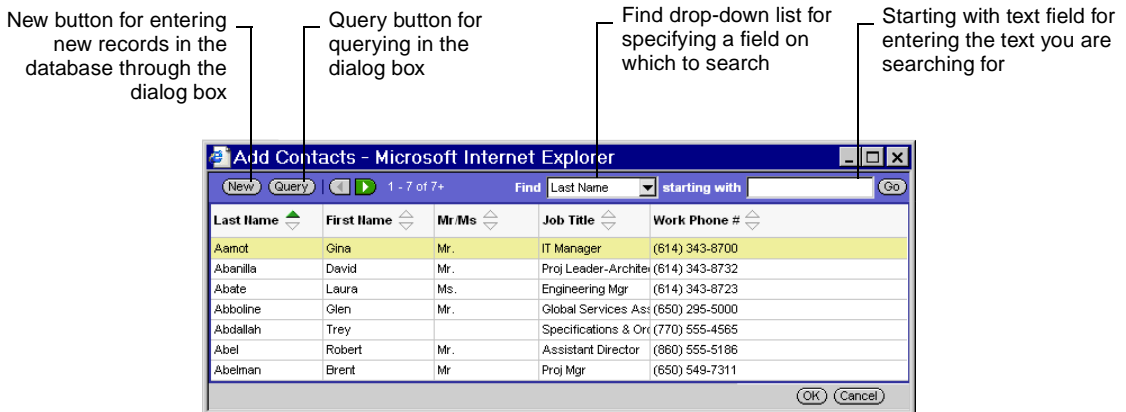
## Adding a Record in a Selection Dialog Box

You may encounter situations in which the data you need is not in the database. In many selection dialog boxes, such as the one shown in [Figure 3-6 on page 3-9](#), you see a New button. This button allows you to enter a new record in the selection dialog box. The record is also stored in the database and will appear in the appropriate location. For example, if you click the Account field select button, the Account dialog box appears. If the account you need is not currently in the list of available accounts and you need to add it, you can add it directly in the dialog box. If you then navigate to the Accounts screen, the account you added will appear within the Accounts screen.

**NOTE:** If you 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 added data does not exist anywhere else in the application except in the record where 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.



**Figure 3-6. Selection Dialog Box**

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

- 1 In the selection dialog box, in the Find drop-down list, choose the column you wish to search on.
- 2 Type the text you are looking for in 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.

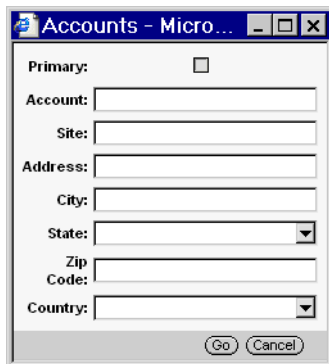
#### **Querying for Records in a Selection Dialog Box**

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 or more columns at one time. You can also refine a query performed within a selection dialog box.

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

- 1 In the selection dialog box, click Query.

A blank query appears.

A screenshot of a Windows-style dialog box titled "Accounts - Micro...". The dialog box contains several input fields for search criteria: "Primary:" with a checkbox, "Account:" with a text box, "Site:" with a text box, "Address:" with a text box, "City:" with a text box, "State:" with a dropdown menu, "Zip Code:" with a text box, and "Country:" with a dropdown menu. At the bottom of the dialog box, there are two buttons: "Go" and "Cancel".

- 2 Enter your query criteria and click Go. (Clicking Cancel returns you to the selection dialog box.)

The records matching the query you specified appear.

- 3 Select the desired record and click OK.

The record is added to the appropriate field.

**To refine a query in a dialog box**

- 1** In the selection dialog box, click Query.  
A blank query appears.
- 2** Enter your query criteria and click Go.  
The records matching the query criteria appear.
- 3** Click Query in the selection dialog box again.
- 4** Enter your query criteria.  
This creates a query that will only run against the query results already received.
- 5** Click Go to execute the refined query.  
The existing query results are filtered to match the refined query criteria.

**Show More Button**

The show more button, shown in [Figure 3-7](#), appears in the upper right corner of all forms and lists. You can use the show more button to expand or collapse a form or list.



**Figure 3-7. Show More Button**

## **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 may also click the menu button, and then click Save Record, or choose File > Save Record from the application-level menu.

## **Canceling Changes**

You may find that you need to cancel edits you made to a record before you save it. You can undo edits you make to a record as long as you have not saved it yet.

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

## Common Record Tasks

Working with records is a common task in your Siebel application. This could mean adding or deleting a record, using hyperlinks in a record, or even attaching documents to a record.

### Using Record Hyperlinks

Hyperlinks appear in a record within a list. They are usually indicated by blue text which becomes underlined when the cursor passes over it. A link 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 allows you to link directly to the account profile in the Accounts screen.

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

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

When you drill across screens using record hyperlinks, you will remain in the same thread, meaning 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 to which you have access, 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, then click New Record.
- From the application-level menu, choose File > New > Record.
- Use the appropriate keyboard shortcut.

---

**NOTE:** For a list of keyboard shortcuts see [Appendix A, “Keyboard Shortcuts.”](#)

---

When you add a record, you receive a new record 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 discuss how to add records using 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 add data. You may not have user privileges that allow you to add this data, or the data may be automatically filled in by the system. Read-only fields cannot be modified.

---

**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** On the chosen list or form, click New.

A new record appears.

- 2** Enter the information.

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

- 1 On the chosen list or form, click the menu button, then click New Record.

A new record appears.

- 2 Enter the information.

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

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

A new record appears.

- 2 Enter the 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 make modifications to the copy.

**To copy an existing record**

- 1 Select the record you want to copy.
- 2 Click the menu button and choose Copy Record.  
A new record with the copied information appears.
- 3 Complete the necessary fields.

---

**NOTE:** You may also copy records using the appropriate keyboard shortcut. For a list of keyboard shortcuts, see [Appendix A, “Keyboard Shortcuts.”](#)

---

## Editing a Record

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

## 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 may also copy records using the appropriate keyboard shortcut. 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.

The list or form the selected record is in will appear with a blue border around it.

- 2** Click the menu button and choose Delete Record.

A dialog box appears, asking you to confirm the deletion.

- 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.

The list or form the selected record is in will appear with a blue border around it.

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

A dialog box appears, asking you to confirm the deletion.

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

---

**NOTE:** In some cases, users cannot delete certain records. This is a system constraint.

---

## 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 your system. A record can be seen by you automatically if you have access rights to view the 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 column in that record. The asterisk can be removed by drilling down on the record.

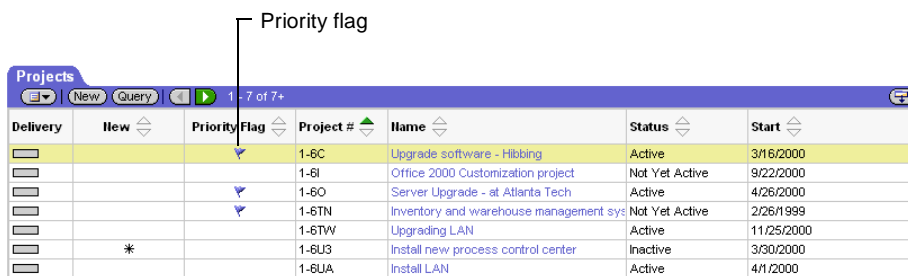
New record indicator

New	Last Name	First Name	Middle Name	Mr/Ms	Work Phone #	Job Title	Email	Account	Site
*	Acey	Mark		Ms.	(617) 555-6767		macey@hotmail.com		
*	Ackerman	David		Mr.	(609) 555-2838	Director of eBusiness	David_Ackerman@excite.com	Bidabike	UK
*	Ackerman	Michael			(408) 555-8055	Sales Manager	mackerman@excite.com	Bidabike	UK
*	Acosta	Sally		Ms.	(313) 555-0196	Process Support Manager	Sally_Acosta@ford.com		
*	Adam	Lingle		Ms.	+495559216117	Letterin Vertrieb	lingle_adam@siebel.com	Chase-Flemming	Paris, France
*	Adam	Victor			(770) 555-4870		vadam@yahoo.com		
*	Adams	Betty			(613) 555-4707	Business Consultant	Betty_Adams@bliqu.com	bLiquid.com	Virginia

**Figure 3-8. Identifying a New Record**

## Flagging a Record

In certain screens, such as Opportunities and Projects, you can flag records that you want to single out. This 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.



Delivery	New	Priority Flag	Project #	Name	Status	Start
<input type="checkbox"/>		<input checked="" type="checkbox"/>	1-6C	Upgrade software - Hilbings	Active	3/16/2000
<input type="checkbox"/>		<input type="checkbox"/>	1-6I	Office 2000 Customization project	Not Yet Active	9/22/2000
<input type="checkbox"/>		<input type="checkbox"/>	1-6O	Server Upgrade - at Atlanta Tech	Active	4/26/2000
<input type="checkbox"/>		<input type="checkbox"/>	1-6TN	Inventory and warehouse management sys	Not Yet Active	2/26/1999
<input type="checkbox"/>		<input type="checkbox"/>	1-6TW	Upgrading LAN	Active	11/25/2000
<input type="checkbox"/>	*	<input type="checkbox"/>	1-6U3	Install new process control center	Inactive	3/30/2000
<input type="checkbox"/>		<input type="checkbox"/>	1-6UA	Install LAN	Active	4/1/2000

**Figure 3-9. Flagging a Record**

---

**NOTE:** If you cannot see a Priority Flag column, check your columns displayed settings. The Priority Flag column is not available in all views.

---

## Adding a Note to a Record

When you are working with records, you will often find that you need to make notes. You can attach 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 desired record.
- 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 wish to add.
- 5** Click New.  
A blank record appears.
- 6** In the Type drop-down list of the new record, choose the note type.
- 7** Click in the Description field and type the note.



**Tip:** Use the Check Spelling button to make sure your note is spelled correctly. For more information about the spell check feature, see [“Spell Checking” on page 3-24](#).

The note is added and you are returned to the Notes list.

---

**NOTE:** You can use the drop-down list in the Notes view to move between public and private notes.

---

## Associating a Record with an Existing 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 an existing 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 row 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 existing records in all screens.

---

## Simultaneously Adding and Associating a Record

### *To associate and add a record at the same time*

- 1 Navigate to the appropriate screen.

The default list of records appears.

- 2 Select the record with which you want to associate the new 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 row or a selection dialog box appears.

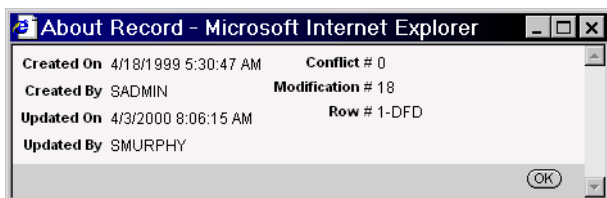
- 5 Do one of the following:

- Complete the fields of the blank record, thus adding a new record.
- Click New in the selection dialog box to add a blank record to the view. Complete the fields of the blank record, thus adding a new record.

## About Record Feature

Use the About Record feature to access system information about a record, such as when it was last edited.

With the desired record selected, choose Help > About Record from the application-level menu to access the About Record dialog box.



**Figure 3-10. About Record Dialog Box**

---

**NOTE:** If you access the About Record dialog box after merging records, it will display the last updated date for the remaining record. It will not show the merge date as the last updated date, nor will 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 many records into one.

---

**NOTE:** Depending on your access privileges and 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 the record will be combined. For example, if you merge an Account record that is associated with a Contact record, both levels will be merged. But, if there is also an Activity associated with the Contact record, it will not be merged. Make sure you merge records with care.

#### To merge two records

- 1 Record the Row # for each record being merged by selecting each record and choosing Help > About Record from the application-level menu.
- 2 Click the record that is to be the source record.
- 3 Press and hold down the CTRL key on your keyboard and click the record that will survive. The source record will be merged *into* the surviving record.
- 4 Click the menu button and choose Merge Records.

A dialog box appears, as shown in [Figure 3-11 on page 3-23](#), 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.

---

- 5 Click OK to accept the merge, or Cancel to abort it.

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



**Figure 3-11. Merge Records Dialog Box**

## Printing Records

You can print records by running a report and then printing the resulting report. For more information about reports, see [“Reports” on page 5-3](#).

## Spell Checking

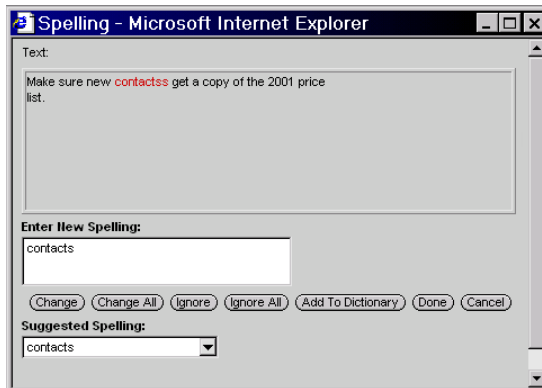
You can perform a spell check from a number of places in your Siebel application. Sometimes spell check will appear as a button, and other times it can be accessed from the menu button. Some areas where the button appears are the Notes view, emails, faxes, and pages. In Notes views and Service Request forms, spell check will check the proper spelling of text in Description and Summary fields. When you invoke spell check from the menu button, you must first step off the record to save the record before selecting spell check from the menu button in order for spell check to work properly.

---

**NOTE:** You can also set up your preferences so that all the emails, faxes, or pages you send from your Siebel application are automatically checked for spelling errors before they go out to a recipient.

---

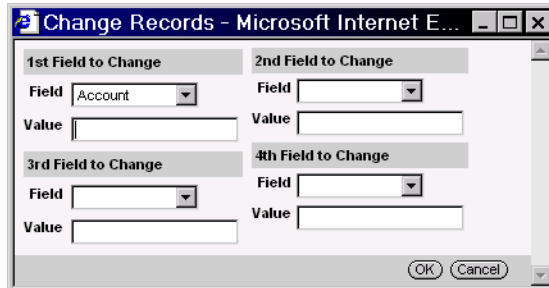
For more information about setting up spell checking defaults, see [“Running Automatic Spell Check” on page 7-10](#).



**Figure 3-12. Spelling Dialog Box**

## Changing Multiple Records

You may need to modify the same data in a number of records. Instead of changing the same thing in each record one at a time, you can change all affected records at once using the Change Records command.



**Figure 3-13.** Change Records Dialog Box

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

- 1 Navigate to the desired screen.
- 2 Select the records you wish to change by holding down the CTRL key on your keyboard and clicking each record.
- 3 Click the menu button and choose 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 wish to change.
- 7 Click OK to apply the changes, or click Cancel to abort the changes.

## Attaching a Document to a Record

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.

### **To attach a document to a record**

- 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, and then click Open.  
The Add Attachment dialog box reappears.
- 7** Click Add.  
The record appears 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.  
A blank record appears.
- 4** Click the Attachment Name field button.  
The Add Attachment dialog box appears.
- 5** Enter the URL in the URL field or drag and drop the URL from the appropriate Web page into the URL field and 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 by 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, and then by city.

---

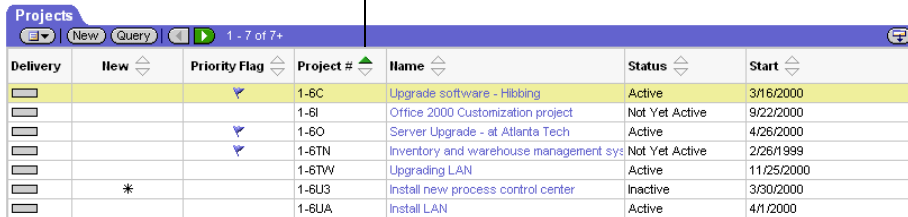
**NOTE:** If you have used any special characters in a field, such as parentheses, you may encounter problems when you try to sort records.

---

## 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 1 to 9 and A to Z; a descending sort organizes records from 9 to 1 and Z to A. Green indicates the active direction of the sort. The Last Name column in [Figure 3-14](#) is sorted in ascending order.

Ascending and descending arrows



Delivery	New	Priority Flag	Project #	Name	Status	Start
			1-6C	Upgrade software - Hibbing	Active	3/16/2000
			1-6I	Office 2000 Customization project	Not Yet Active	9/22/2000
			1-6O	Server Upgrade - at Atlanta Tech	Active	4/26/2000
			1-6TN	Inventory and warehouse management sys	Not Yet Active	2/26/1999
			1-6TW	Upgrading LAN	Active	11/25/2000
	*		1-6U3	Install new process control center	Inactive	3/30/2000
			1-6UA	Install LAN	Active	4/1/2000

**Figure 3-14. 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.

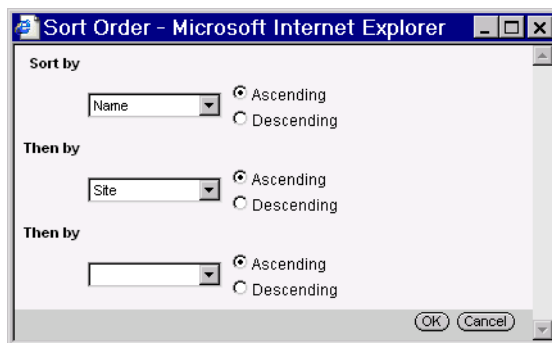
---

**NOTE:** The sort order will be reset when you leave the screen.

---

**Performing an Advanced Sort**

The advanced sort feature allows you to sort on up to three columns at once.



**Figure 3-15. Sort Order Dialog Box**

***To perform an advanced sort***

- 1** In a list, click the menu button and choose Advanced Sort.

The Sort Order dialog box appears.

- 2** In 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.









## Organizing Columns in a List

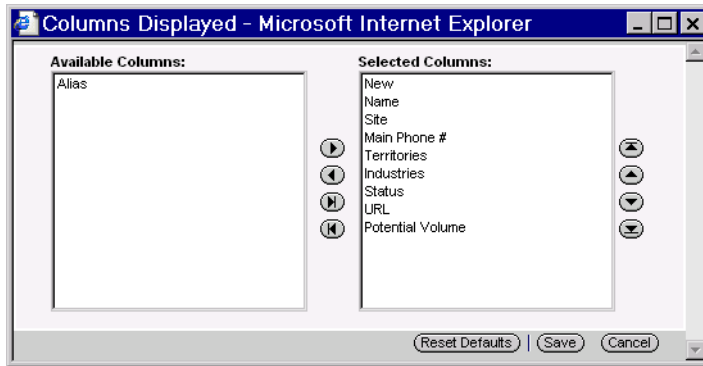
A list consists of many columns of data, some of which may not be displayed onscreen. Depending on the columns you need to work with, you can add, remove, or rearrange the columns in the order that works best for you.

### Columns Displayed

See [Table 3-3](#) for explanations of each button in the Columns Displayed dialog box. An example of the Columns Displayed dialog box appears in [Figure 3-16](#) on [page 3-32](#).

**Table 3-3. Columns Displayed Buttons**

Button	Description
	Moves a selected column down one position in the list.
	Moves a selected column up one position in the list.
	Moves a selected column down to the bottom of the Selected Columns list.
	Moves a selected column up to the top of the Selected Columns list.
	Shows the selected columns.
	Hides the selected columns.
	Shows all columns.
	Hides all columns.



**Figure 3-16. Columns Displayed Dialog Box Example**

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

- 1** In a list, click the menu button and select 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 only available 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 in order to view data more easily.

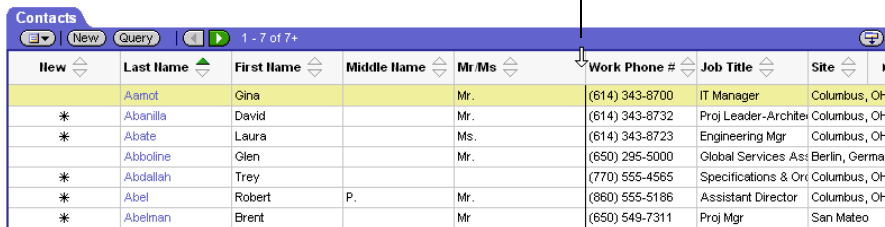
### To resize columns

- 1 Place the cursor over the column header divider.

A downward-pointing arrow appears.

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

When your cursor hovers between column headers, this downward pointing arrow appears, allowing you to widen or narrow the column to the left of the arrow.



The screenshot shows a table with the following columns: New, Last Name, First Name, Middle Name, Mr./Ms, Work Phone #, Job Title, and Site. A downward-pointing arrow is positioned over the divider between the 'Mr./Ms' and 'Work Phone #' columns.

New	Last Name	First Name	Middle Name	Mr./Ms	Work Phone #	Job Title	Site
	Aamot	Gina		Mr.	(614) 343-8700	IT Manager	Columbus, OH
*	Abanilla	David		Mr.	(614) 343-8732	Proj Leader-Archite	Columbus, OH
*	Abste	Laura		Ms.	(614) 343-8723	Engineering Mgr	Columbus, OH
	Abboline	Glen		Mr.	(650) 295-5000	Global Services Asst	Berlin, German
*	Abdallah	Trey			(770) 555-4565	Specifications & Orc	Columbus, OH
*	Abel	Robert	P.	Mr.	(860) 555-5186	Assistant Director	Columbus, OH
*	Abelman	Brent		Mr.	(650) 549-7311	Proj Mgr	San Mateo

**Figure 3-17. Column Resizing Arrow**

## 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 the CTRL, ALT, and SHIFT keys, 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 the TAB key.

### 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 ship with Siebel applications. These shortcuts are defined in Siebel Tools. Ask your Siebel administrator if you need to know which mode is implemented with your Siebel application.

#### 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 where 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 use any special keys, such as function keys or arrow keys, in their key sequences.

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, Inc.

### **Basic Mode**

Basic mode keyboard shortcuts cannot use any key sequences already being used by your Web browser. In a case where 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.

## 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 had been creating will be deleted.

Once 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 3-22](#).



**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 errors 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

Converts names and addresses to either mixed case, all lowercase, or all uppercase. For example, john smith becomes John Smith.

### Truncation

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

For more information about Data Quality, see *Siebel Data Quality Administration Guide, MidMarket Edition*.



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# About This Chapter

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 set a saved query as the default view for a particular screen. For more information, see [“Setting Up Default Queries” on page 7-9](#).

## Finding Search and Query Information

Check [Table 4-1](#) for help in locating more information on searching and querying.

**Table 4-1. Where To Find Search and Query Information**

<b>For information on this...</b>	<b>See this...</b>
Basic query tasks	<i>Fundamentals, MidMarket Edition</i> <i>Online Help</i>
Query operators	<i>Fundamentals, MidMarket Edition</i> <i>Online Help</i>
Advanced query tasks	<i>Siebel Tools Reference, MidMarket Edition</i>
Setting up predefined queries (PDQ)	<i>Applications Administration Guide, MidMarket Edition</i>
Search functionality	<i>Fundamentals, MidMarket Edition</i> <i>Online Help</i> <i>Siebel Search Administration Guide, MidMarket Edition</i>
Search operators	<i>Siebel Search Administration Guide</i>
Advanced search functionality	<i>Personalization Administration Guide, MidMarket Edition</i>

# 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.

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 4-1. 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 menu button and choose New Query.
- Choose Edit > Query > New from the application-level menu.
- Use the appropriate keyboard shortcut.

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

- Click Go where available.
- Click the menu button and choose Run Query.
- Choose Edit > Query > Run from the application-level menu.
- Use the appropriate keyboard shortcut.

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

- Click the menu button 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 From the list or form, click Query.

A blank form or 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 wish to query on, you 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 and the field should be available.

#### **To refine a saved query**

- 1 Navigate to the desired screen.
- 2 In 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, showing all 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 3-10.

## Query Tips

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

- 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 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, use a filter in the Show drop-down list to replace it with a default set of records or use the Queries drop-down list to select another saved query.

- 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 under another name. Select the query from the Queries drop-down list. Click the menu button and choose 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 under 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.
- 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 contains blank spaces, you must place quotes around the query or the spaces will be ignored and you will receive inaccurate results. For example, if you search for *Siebel Systems* and do not enclose the text in quotes, you will end up with results containing only *SiebelSystems*.
- 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.
- 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 7-9](#). 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.

---

## 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 wishes 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.

## Query Operators

There are several common query operators you can use to define your query criteria.

[Table 4-2 on page 4-10](#) shows these commonly used query operators. For more query operators, see [Appendix B, "Query Operators."](#)



**Caution:** Query operators are reserved Siebel query language. If you create a query which has a query operator in it, you must put the query in double quotes. For example, running a query for records containing the following 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 (,), parenthesis (()), double quote ("), tilde (~), and comparison operators such as =, <, and >.

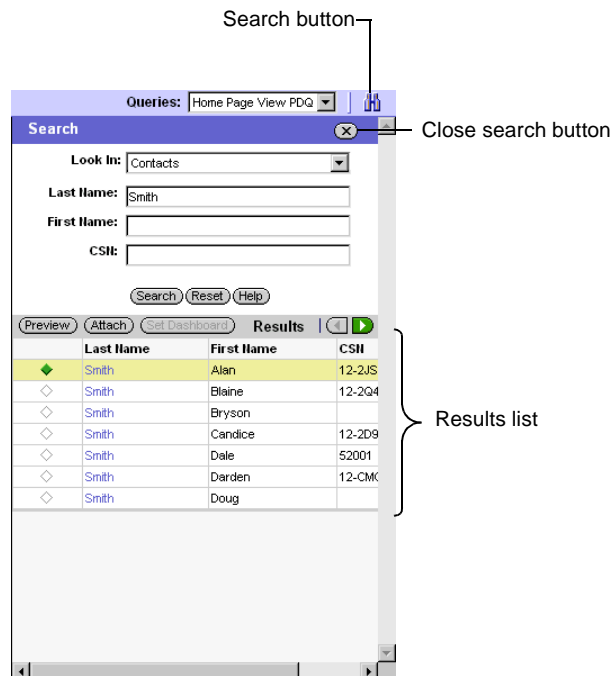
**Table 4-2. Common Query Operators**

<b>Operator</b>	<b>Description</b>	<b>Example</b>
=	Equal to	=CA retrieves all records in which the value in the 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 <i>Sie</i> . Wildcards can also be placed in the middle or at the beginning of a text string.
" "	Double quotes	"Siebel Systems" retrieves all records that contain <i>Siebel Systems</i> 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.

## 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 Queries drop-down list on the Siebel 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 4-2. Search Center**

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

### **To perform a search**

- 1** From any screen, click the search button.

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

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

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

- 3** Enter the search criteria.

- 4** Click Search.

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

- 5** To preview a record from the Results 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 to the left of the Search Center.

## Search Operators

You can use two wildcard operators to refine your searches.

**Table 4-3. 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 <i>arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle</i> , and so on. It is not necessary to put a wildcard at the end of the word, for example, Siebe will return <i>Siebel</i> .
?	Placed anywhere in a string, returns records containing the characters specified in the string, such that any character may appear at the location of the question mark. For example, ?rag finds <i>brag, crag, or drag</i> , but not <i>bragging</i> . t?pe finds <i>type, tape</i> , but not <i>tripe</i> . To find a question mark, precede the question mark with a backslash. Type \? to find values that contain a question mark.

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

## **Locating Information**

*Using the Search Center*

# Sharing Information

# 5

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## About This Chapter

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

- Using reports
- Sending information directly from the application through email, fax, or page
- Exporting or importing information to or from the application
- Synchronizing your local database to the server database or the server database to your local database

## 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 from the View menu in the application-level menu. Different reports are associated with each screen. The particular reports available depend on the current screen. Most screens provide reports.



**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 4-6.

Reports are displayed in a browser window, as shown in [Figure 5-1](#).

Account List						
<b>Yosemite Group</b>						
Location: HQ		Main Phone No.: (800) 437-5148		Main Fax:		
Address	Comments	Acct. Type	Status	Industry	Parent Acct	Synonyms
100 California Street Yosemite Valley CA 94819 USA		Commercial	Active	computer & software stores		
<b>Young Company</b>						
Location: Richmond, VA		Main Phone No.: (804) 397-3536		Main Fax: (804) 397-3547		
Address	Comments	Acct. Type	Status	Industry	Parent Acct	Synonyms
850 Parkin Ave. Richmond VA 20160 USA		Competitor	Active	computer integrated systems design		
<b>Zapit.com</b>						
Location: St. Louis, MO		Main Phone No.: (314) 468-9965		Main Fax: (314) 353-6666		
Address	Comments	Acct. Type	Status	Industry	Parent Acct	Synonyms
4515b St. St. Louis MO 63153 USA		Competitor	Active	computer integrated systems design		
<b>Zebra Electronics</b>						
Location: Boston		Main Phone No.: (617) 964-1241		Main Fax:		
Address	Comments	Acct. Type	Status	Industry	Parent Acct	Synonyms

**Figure 5-1. Siebel Report Viewer**







#### **To run a report**

- 1 Navigate to the appropriate screen.
- 2 From the application-level menu, choose View > Reports.  
A dialog box appears.
- 3 In the Select a Report drop-down list, click the desired report.
- 4 Click Run.



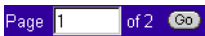
The report appears in a new browser window.

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.

**Table 5-1. Report Controls (1 of 2)**

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.

**Table 5-1. Report Controls (2 of 2)**

Button	Name	Description
	Next Page	Takes you to the following 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, and Paging

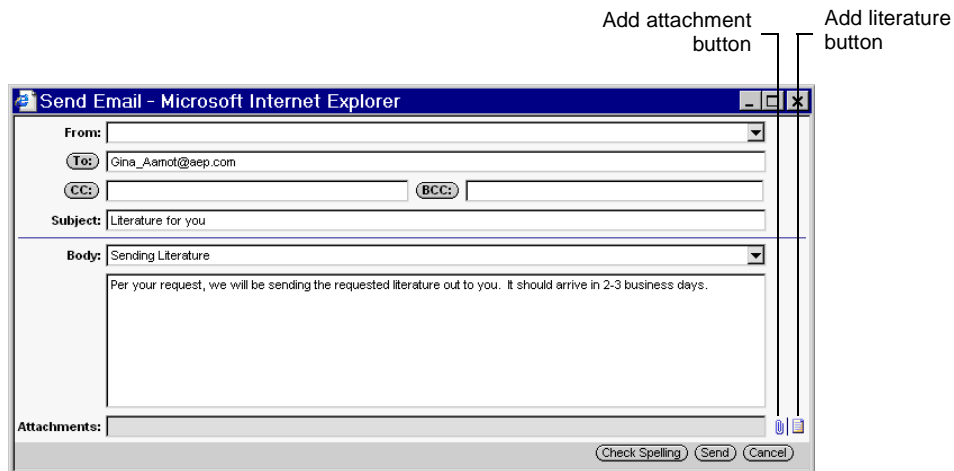
You can send email, faxes, and pages from within a Siebel application. The record that is active when the Send command is executed determines what information will be sent and what options are available. The following commands are available from the File menu:

- **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.

---

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

---



**Figure 5-2. Send Email Dialog Box**

---

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

---

**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 will 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.

- 4 Verify that the From field contains your profile name. If it does not, select a profile name from the From drop-down list. If no profile is available, see your administrator.
- 5 Fill in the appropriate fields. You may 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 will automatically attach the file to the email.

- 6 If you have selected HTML as your Send Email 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 their email client software supports HTML. For more information about setting email formatting options, see [“Customizing Outbound Email” on page 7-8](#).
- 7 Click Check Spelling to run a spell check on the text of the email.
- 8 Click Send to send the email.

## Sharing Information

---

*Emailing, Faxing, and Paging*

---

**NOTE:** For more information about Send Email functionality, see the documentation update for *Siebel Call Center User Guide, MidMarket Edition* posted on SupportWeb.

---

Sending a fax or a page follows the same procedure as sending an email. Simply choose File > Send and the appropriate command from the application-level menu. If you cannot send a fax or a page, see your administrator. You may not have access to these features.

## Importing and Exporting

Import and export features allow you to import data into the application and to export data out of the application. You can access these features from the menu button in a list.

### Importing Data

You can only import data into certain parts of your Siebel application. In particular, you cannot import contacts into the My Personal Contacts view. The only way to add personal contacts is by creating new records in the Personal Contacts view, or by synchronizing with a personal information manager (PIM) such as Microsoft Outlook. See your Siebel administrator for more information.

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

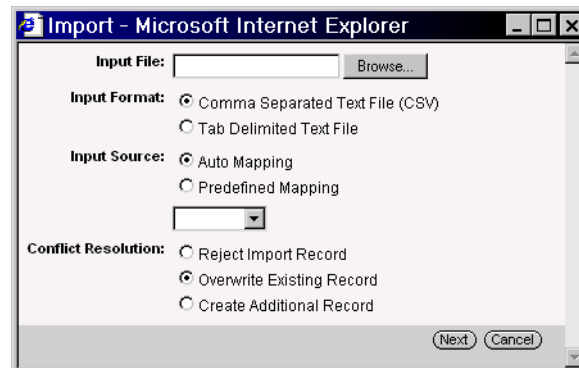
- 1 Navigate to the screen into which you want to import data.
- 2 Click the menu button and choose Import.

---

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

---

The Import dialog box appears.



- 3 Select the appropriate parameters.

- 4 Click Next.

---

**NOTE:** You can import a maximum of 2000 records at one time.

---

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

- 5 Click OK.
- 6 Click View Log to review information about the import.

For more information about importing data, see *Online Help*.

---

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

---

## 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 contains dates or numbers, they will be formatted according to your machine's Regional Settings properties. Your Regional Settings are configured using the Control Panel.

---

**NOTE:** In some cases, the formatting may depend on the Regional Settings set up by your company on the server. Check with your Siebel administrator.

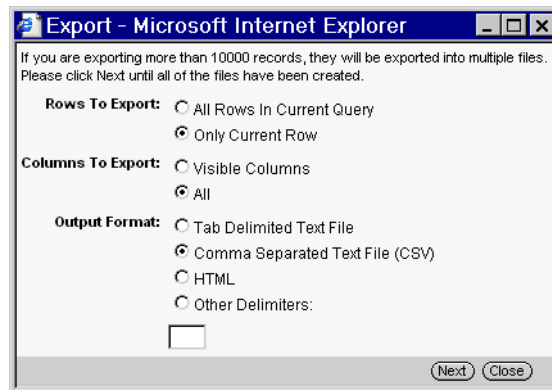
---

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

**To export data to an external file**

- 1 Navigate or query to the list of data you want to export.
- 2 Click the menu button and choose Export.

The Export dialog box appears.



- 3 Select the appropriate parameters.
  - 4 Click Next.
- The File Download dialog box appears.
- 5 Select Save This File to Disk and click OK.
- The Save As dialog box appears.
- 6 Type the desired filename (indicating the path if necessary).
  - 7 Click Save.

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:** If a record you exported contains a multi-value group field, only the primary value for that field will be exported.

---

For more information about exporting, see *Online Help*.

# Synchronizing Data

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

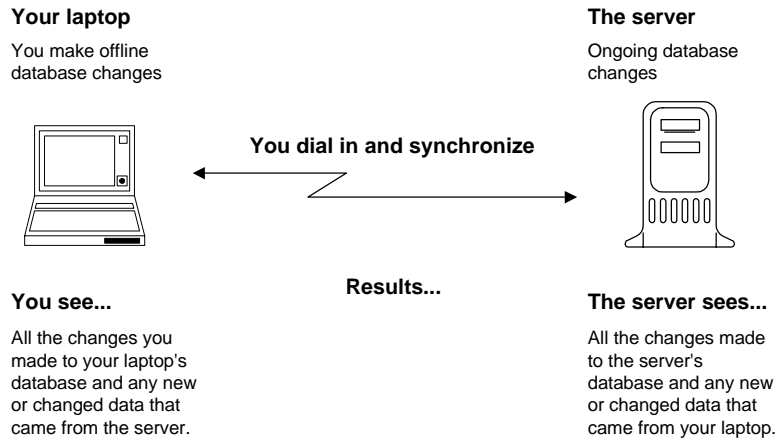


**Caution:** If you do not synchronize regularly, important data may be lost.

The copy of the database that resides on your laptop is generally referred to as a local copy of the database. It is an exact copy of the data that resides on the main database on the home server. The main database is referred to as the server copy. 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 copy with the server copy. This means that you send data to the server copy and receive data from it. See [Figure 5-3 on page 5-13](#).

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 laptop database upon synchronization.

## Synchronization Process



**Figure 5-3. Simulated Synchronization Process**

You need to synchronize regularly in order 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.*

---

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

## **Synchronizing with a Personal Information Manager**

If you use a third-party personal information manager (PIM) such as Microsoft Outlook, Lotus Notes, or Novell Groupwise, the Siebel synchronization application allows you to synchronize data between the server and your PIM. (See [Figure 5-3 on page 5-13](#).) In this way you can manage contacts, accounts, activities, and activities, keeping both your PIM and the server up-to-date with the latest information.

For information on supported PIMs and operating system platforms, see *Siebel System Requirements and Supported Platforms, MidMarket Edition*.

For details on how to synchronize your PIM with the server, see *Online Help*.

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### **About This Chapter**

This chapter discusses using the calendar to manage your time and activities. It provides an overview of the common tasks you will use your calendar for, such as adding activities, deleting activities, changing activities, and adding users to your activities.

## Calendar Overview

The Calendar screen allows you to manage your time and 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 coincide with each other, and click a show more button to view activities which occur outside of your regular work hours as determined in your User Preferences. For more information about the Calendar screen and User Preferences, see [“Customizing Aspects of the Calendar” on page 7-11](#).

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 Sales User Guide, MidMarket Edition*.

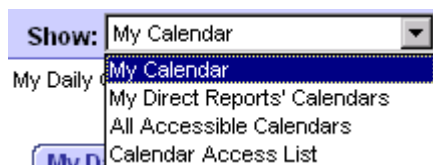
Calendar views are also available in a number of screens, such as Accounts, Contacts, Projects, and Opportunities. Each Calendar view allows you to create activities without having to go to the Calendar screen and leave the screen you are in. It also allows you to associate activities with an active 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 [“Using Queries” on page 4-4](#).

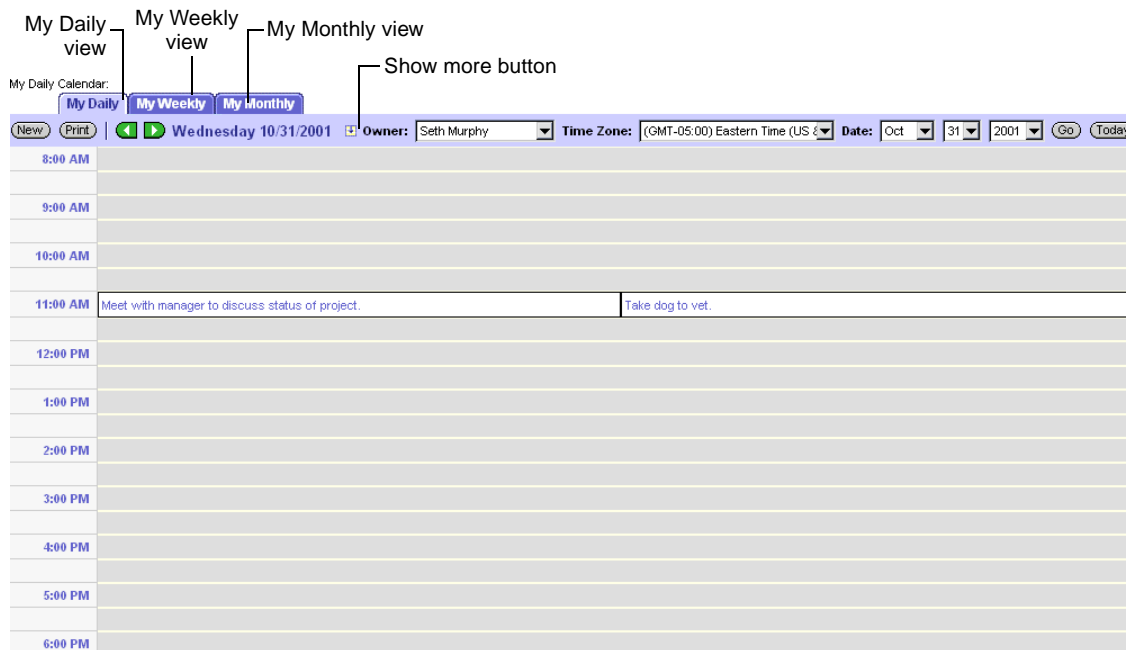
# Calendar Views

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

Access the Calendar views by navigating to the Calendar screen and selecting My Calendar from the Show drop-down list.



**Figure 6-1. Calendar Show Drop-Down List**



**Figure 6-2. Calendar Screen - My Daily View**

## Calendar Tasks

Throughout your day, you can use your calendar to view activities, add activities, change activities, and delete activities. This section describes the steps involved in performing these common tasks in your calendar.

### 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.
- 2 From the Show drop-down list, select My Calendar.  
The calendar appears, showing the My Daily view.
- 3 Click the My Weekly or My Monthly tab to change the view.

### Viewing the Calendar in More and Less Mode

You may view a shortened version of your daily, weekly, or monthly calendar, or you may view it in its entirety. Use the show more button located in the My Daily view and in each day's cell in the My Weekly and My Monthly views to switch between the more and less calendar modes.

**Calendar Show Less Mode.** The less mode will limit the activities you see in each calendar view. In the My Daily view, you will only see activities that have been scheduled within the hours of your regular work day (as defined in the Calendar tab of the User Preferences screen). For more information about setting up your calendar preferences, see [“Customizing Aspects of the Calendar” on page 7-11](#). In the My Weekly and My Monthly views, only a limited number of records per day will be displayed in the show less mode. You may find the show less mode is helpful when you want to view your entire calendar on one screen or print it on one page.

**Calendar Show More Mode.** The more mode will display all of the activities on your calendar in whichever view you are in. The My Daily, My Weekly, and My Monthly views will expand to accommodate all of your activities.

## 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** From the Show drop-down list, select My Calendar.
- 3** In the My Daily, My Weekly, or My Monthly view, click New.

The Calendar Detail form appears.

- 4** Complete the fields.
- 5** Click Save This One.

The activity appears in your calendar, so long it contains either a planned start time or a due date.

## Adding a Recurring Calendar Activity

You may find that you have to schedule weekly meetings. Instead of adding a new meeting every week, 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** From the Show drop-down list, select My Calendar.
- 3** In the My Daily, My Weekly, or My Monthly view, click New.

The Calendar Detail form appears.

- 4** Complete the fields.
- 5** Check the Repeat check box to make this activity recurring.
- 6** From the Frequency drop-down list, select Daily, Weekly, Monthly, Quarterly, or Yearly, depending on how often you want this activity to repeat.

- 7 Click the Until button to select the date on which the activity is to stop recurring from the Calendar pop-up dialog box.
- 8 Check the Alarm check box to trigger an alarm for this activity.
- 9 Click Save This One.

**To change a recurring activity to a non-recurring activity**

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

The Calendar Detail form appears.

- 4 Uncheck the Repeat check box.
- 5 Click the Save All button.

All future instances of the activity will be deleted. However, the activity for the current day will not be deleted nor will any previous instances of the activity be 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 Show drop-down list, choose My Calendar.
- 3 In the My Daily, My Weekly, or My Monthly view, click the Description hyperlink to access the activity.

The Calendar Detail form appears.

- 4 Click Delete This One.

---

**NOTE:** If you are the primary employee on the activity the activity will be deleted from every participant's calendar. If you are a non-primary employee on the activity, the activity will only be deleted 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 Show drop-down list, choose My Calendar.
- 3** In the My Daily, My Weekly, or My Monthly view, click the Description hyperlink to access the activity.

The Calendar Detail form appears.

- 4** 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 Show drop-down list, select My Calendar.
- 3** In the My Daily, My Weekly, or My Monthly view, click the Description hyperlink to access the activity.

The Calendar Detail form appears.

- 4** Click Delete All.

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

## Changing a Calendar Activity

After adding an activity to your calendar, you can go back and make changes to it.

### **To change an activity**

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

The Calendar Detail form appears.

- 4 Make the necessary changes and click Save This One.

## 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.



**Tip:** To select multiple records in a dialog box, hold down the CTRL key on your keyboard as you click each record or, if the records are consecutive, hold down the SHIFT key and press the down arrow on your keyboard.

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

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

The Calendar Detail form appears.

- 3 Complete the fields.
- 4 Click the Contacts select button.

The Contacts dialog box appears.

**5** Click New.

The Contacts dialog box is updated. It now contains contact records that exist in the database.

**6** Add a contact by selecting the contact's record.

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

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

The Contacts dialog box appears containing the names of the contacts you selected.

**8** Click OK.

The Calendar Detail form appears with an updated Contacts field. The contacts you selected are now a part of the activity.

**To add employees to an activity**

**1** Navigate to the Calendar screen.

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

The Calendar Detail form appears.

**3** Complete the fields.

**4** Click the Employees select button.

The Employees dialog box appears.

**5** In the Employees list, click New.

The Employees dialog box is updated. It now contains employee records that exist in the database



**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.

- 6** Add an employee by selecting the employee's record.

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

---

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

---

- 7** Click OK once you have selected all the employees you want to add.

The Employees dialog box appears containing the names of the employees you selected.

- 8** Click OK.

The Calendar Detail form appears with an updated Employees field. The employees you selected are now a part of the activity.

- 9** Click the Check Employee Availability button in the Calendar Detail form to see if an employee is available.

The Employees list and the Employee Availability subview appear beneath the Calendar Detail form.

- 10** On the Calendar Detail form, click Edit to revise the activity, or click Calendar to return to the Calendar view. Your changes are saved automatically.

### Using the Employee Availability Subview

The chart, also called the Employee Availability subview, that appears when you click Employee Availability in the Calendar Detail form can tell you a great deal about the activity and its participants. The following are tips meant to help you get the most out of this subview.

- If you add employees in the Add Employees dialog box while the Employees list and Employee Availability subview are open, you must click Refresh in the Employee Availability subview to make the newly added employees appear.
- If you add employees using the Employee field in the Calendar detail form, they will not appear in the Employee List subview until the list is refreshed. To refresh the list, click the menu button and choose Run Query.
- If you add employees to the activity or change the time of the appointment, these changes will not appear in the Employee Availability subview until it is refreshed. To refresh the Employee Availability subview, click the Refresh button.
- Click New in the Employee List subview to add new participants to the activity.
- Busy time is blocked off in one-hour increments even if an activity lasts less than one hour. To get more information about an activity, place your cursor over the time blocked out. The planned start and planned completion times will appear.
- All of the employee calendars that you see in the subview are converted to the time zone specified by 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 will be converted to Pacific time. If the Eastern time zone user is looking at the same activity in her calendar, it will be converted to Eastern time.
- You cannot use the employee availability when you are modifying an existing recurring appointment. You can, however, use the feature when creating recurring or non-recurring appointments and when modifying non-recurring appointments.

## Reassigning an Activity

After creating an activity and adding employees to it, you may find that you need to reassign the activity to another employee.

### **To reassign an activity**

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

The Calendar Detail form appears.

- 4** Click the Employees select button.

The Employees dialog box appears. You have to change the primary employee in order 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 you wish to reassign the activity to.

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** Remember to remove the previous primary employee from the participant list if that person is no longer involved with the activity.

### 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** In 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 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 the allow the employee to add activities directly to your calendar.

### Using Group Calendars

If you are the member of a group, you will likely want to see certain calendar activities common to all group members such as trade shows, training events, holidays, and so on. Having access to a shared calendar would achieve this. Your administrator can create a user representing your group and give you and your group members access to it. See your 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. Alarm notification takes place by displaying a dialog box or pop-up window in the Siebel application window at a predetermined interval before the start of an activity. The Alarm dialog box appears only one time for each activity it is set for, unless the activity is recurring. If the activity is recurring, the alarm appears at the specified time before the start of each instance of the activity. To learn how to change the interval at which an alarm triggers before an activity see [“Configuring Alarms” on page 7-12](#).

---

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

---



**Tip:** The Suppress Calendar check box found in an Activity record, which prevents this activity from appearing in a calendar, does not affect the appearance of an alarm for this activity.

To set the 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 alarms for a calendar activity**

- 1** Navigate to the Calendar screen.
- 2** In the Show drop-down list, select My Calendar.
- 3** In the My Daily, My Weekly, or My Monthly view, click New to add an activity to the calendar.

The Calendar Detail form appears.

- 4** Complete the desired fields.
- 5** Check Alarm.
- 6** Click Save This One.

### Changing the Date and Time Zone

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

#### **To change the date and time zone**

- 1** In the current Calendar view, in the Time Zone drop-down list, select a time zone.
- 2** Click the Date drop-down list and change the month, day, and year as needed.

---

**NOTE:** The format of the date and time fields in your Siebel application correspond to the Regional Settings in the Control Panel of your computer.

---

- 3** Click Go.

The calendar shows the selected date.



**Tip:** You can set a default time zone for your calendar in the User Preferences screen. For more information, see [“Time Zone Preferences” on page 7-7](#).

### Querying Your Calendar

You can run queries for activities in your calendar. To do so, 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 [“Using Queries” on page 4-4](#).

## Printing Your Calendar

You can print your calendar directly from your Siebel application or you can print a list of your activities from a generated report.

### **To print your calendar from the application**

- 1 Navigate to the Calendar screen.
- 2 In the Show drop-down list, select My Calendar.
- 3 In the My Daily, My Weekly, or My Monthly view, click Print.



**Tip:** If you are using Internet Explorer, make sure your Internet options are set up as follows or the calendar will not print properly. On the browser toolbar click Tools > Internet Options. Click the Advanced tab and under the print option select Print colors and background images.

### **To print a list of your activities**

- 1 Navigate to the Calendar screen.
- 2 In the Show drop-down list, select My Calendar.
- 3 Click the My Daily, My Weekly, or My Monthly tab, depending on which activities you would like to print.
- 4 From the application-level menu, select View > Reports.

The Reports dialog box appears.

- 5 Click Run.

A report appears containing a list of the activities on your calendar.

- 6 Click the print button.

---

**NOTE:** For more information about reports, see [“Reports” on page 5-3](#).

---

## Using the Calendar

*Calendar Tasks*

# Customizing the User Interface

# 7

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### **About This Chapter**

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.

You can perform customization on your home page and in the User Preferences screen.

# 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 7-1](#).

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

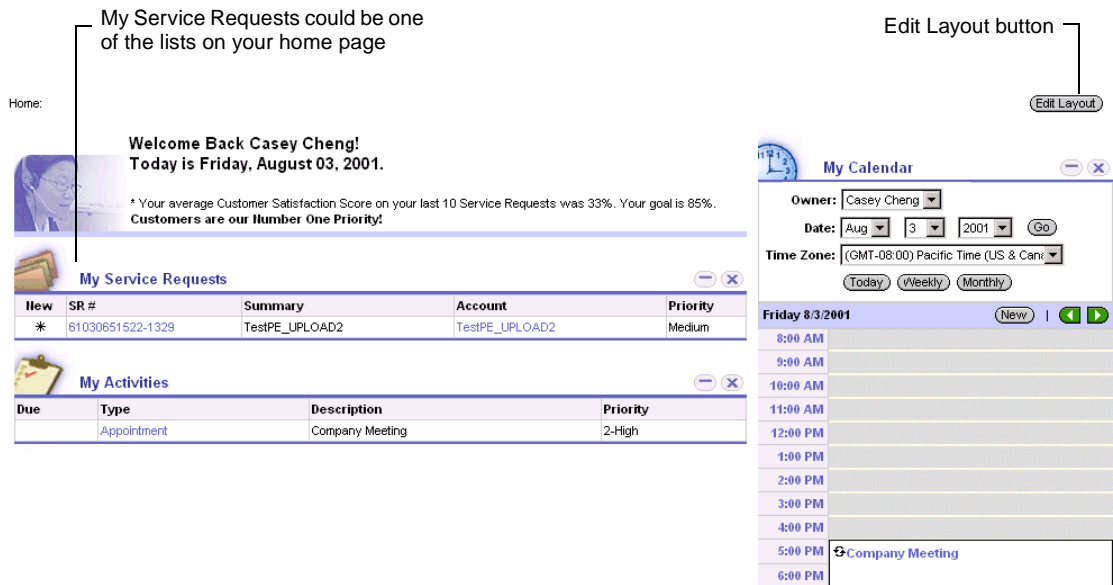


Figure 7-1. Home Page Example

### Using the Home Page Controls




The home page controls are in the top right corner of each section. These controls, shown in [Table 7-1](#), allow you to manage what appears on the home page. If you use the hide button to remove a list or form 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 7-1. 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 the list of records. If the list cannot be collapsed, you will see the expand button instead of the collapse button.
	Expand	Allows you to expand the list of records. If the list cannot be expanded, you will see the collapse button instead of the expand button.

## Editing the Page Layout

The Edit Layout page, shown in [Figure 7-2 on page 7-6](#), gives you access to advanced layout features. You can show hidden lists or forms, collapse or expand all lists or forms 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 7-2](#). Changes that you make to the layout using this page are saved and will apply in future sessions.

**Table 7-2. 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 the 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. An example of the User Preferences screen is shown in [Figure 7-2](#).

Some of the defaults you can view and perhaps even edit in the User Preferences screen include your password, time zone, calendar, spelling, default queries, and other items that relate 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.

Profile:

Profile Behavior Calendar Change Position Communications Correspondence Data Quality Expense Reports Default Queries Outbound Cor

1 of 1

CONTACT INFORMATION		POSITION AND RESPONSIBILITY	
<b>Last and First Name:</b> Modi, Emily	<b>Home Phone #:</b> <input type="text"/>	<b>Position:</b> Engagement Manager	<b>Current Status:</b> Fully Available
<b>Title:</b> Global Services Engagement Mana	<b>Work Phone #:</b> (650) 295-5000	<b>Responsibilities:</b> Consulting Manager	<b>Until:</b> <input type="text"/>
<b>Division:</b> Siebel Professional Services	<b>Cell Phone #:</b> <input type="text"/>		<b>Next Status:</b> <input type="text"/>
<b>User ID:</b> EMODI	<b>Fax #:</b> (650) 295-5111	<b>NOTIFICATION PREFERENCE</b>	
<b>Password:</b> <input type="password"/>	<b>Pager #:</b> <input type="text"/>	<b>Default Contact Method:</b> <input type="text"/>	
<b>Verify Password:</b> <input type="password"/>	<b>Pager PIII:</b> <input type="text"/>	<b>Emergency Contact Method:</b> <input type="text"/>	
<b>Time Zone:</b> <input type="text"/>	<b>Email:</b> emily_modi@siebel.com		

**Figure 7-2. User Preferences Screen**

---

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

---

## Updating Profile and Behavior Settings

From the Profile tab in the User Preferences screen, you can view your contact information, position and responsibilities, and other information specific to you. Depending on your access privileges, you can also 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 and interpret date/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 Click the Profile tab.
- 3 Click the Time Zone select button.

The Pick Time Zone dialog box appears.

- 4 Select the desired time zone and click OK.

### Modifying the History List

You may wish 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 Click the Behavior tab.

The Behavior form appears.

- 3 Enter the number of threads you want the History list to retain in the Maximum Threads Saved field.

### Customizing Outbound Email

You may specify whether you want to format outgoing email using HTML controls.

**To specify edit mode of outgoing email**

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

The User Preferences screen appears.

- 2** Click the Outbound Communications tab.

The Outbound Communications form appears.

- 3** From the Send Email Default Message Format drop-down list, select either Plain Text or HTML.

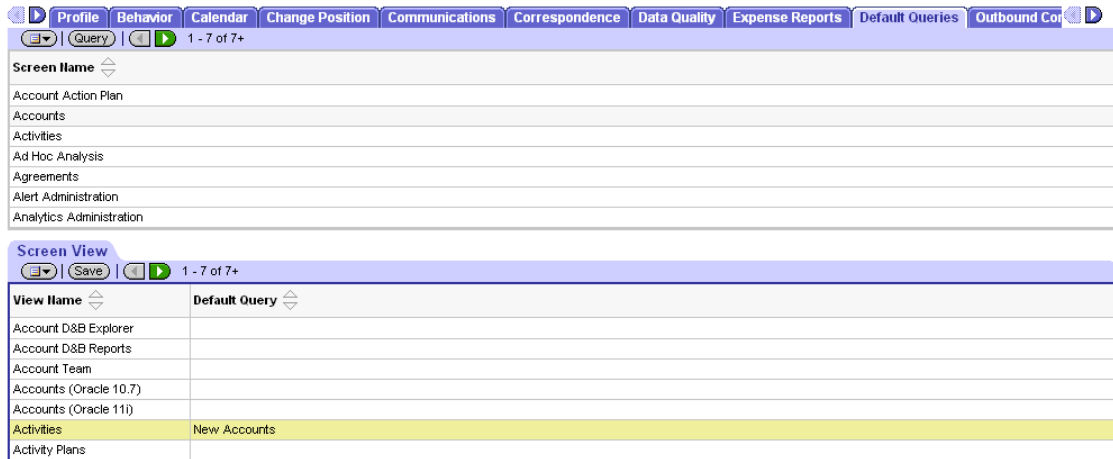
---

**NOTE:** For more information about HTML controls and editing outbound email, see the documentation update for *Siebel Call Center User Guide, MidMarket Edition* posted on SupportWeb.

---

## Setting Up Default Queries

Using the Default Queries tab in the User Preferences screen, shown in [Figure 7-3](#), you can set up queries to appear as default views when you access a screen.



**Figure 7-3. User Preferences Screen - Default Queries Tab**

### **To make a query the default for a view**

- 1 From the application-level menu, choose View > User Preferences.  
The User Preferences screen appears.
- 2 Click the Default Queries tab.  
The Screen Name and Screen View lists appear.
- 3 In the Screen Name list at the top of the screen, select the appropriate screen.
- 4 In the Screen View list below the list of screens, select the appropriate view in the View Name column.
- 5 Click the Default Query field next to the view you pick, 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 default to and click OK.

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

For more information on queries, see [“Using Queries” on page 4-4](#).

## Running Automatic Spell Check

You can set up Spell Check to run automatically on any emails, faxes, and pages that you send from the Siebel application. For more information about spell checking, see [“Spell Checking” on page 3-24](#).

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

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

The User Preferences screen appears.

- 2 Click the Spelling tab.

The Spelling form appears.

- 3 Check the Always Check Spelling Before Sending check box.

## Customizing Correspondence

From the Correspondence tab, you can set up default templates, a default fulfillment center, a default ship method, and a default time frame.

### **To customize your correspondence**

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

The User Preferences screen appears.

- 2 Click the Correspondence tab.

The Correspondence form appears.

- 3 Edit the desired fields.

## Customizing Aspects of the Calendar

You can customize aspects of your calendar to better suit your needs from the Calendar tab in the User Preferences screen.

### Length of the Calendar Day

The My 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 to 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 Click the Calendar tab.

The Calendar form appears.

- 3 Enter the desired calendar start time in the Start Day At field.

- 4 Enter the desired calendar end time in the End Day At field.

### Default Calendar Activity Duration

Each activity you schedule on your calendar will have a default duration time. 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 Click the Calendar tab.

The Calendar form appears.

- 3 Select the desired activity length from the Appointment Duration (in minutes) drop-down list.

### Configuring Alarms

Alarms notify users of upcoming activities. You may configure the time at which the notification takes place from the Calendar tab in the User Preferences screen.

#### **To set the time that alarms appear**

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

The User Preferences screen appears.

- 2** Click the Calendar tab.

The Calendar form appears.

- 3** In the Set Alarm drop-down list, select a time from 5 to 120 minutes before the value of Planned Start for each activity. This is the time you want all alarms to trigger before an appointment or reminder.

# Keyboard Shortcuts

# A

You can use the following keyboard shortcuts to invoke commands and navigate in your Siebel application. They are available in both basic and extended mode.

**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 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 3-34](#).

The shortcuts in [Table A-1](#) and [Table A-2](#) are shown according to the actions they perform. The context column indicates where in the application that action would be used. Keyboard shortcuts are based on application context. If the corresponding command is not available in the application, the shortcut will not be active.

**Table A-1. Command Shortcuts (1 of 2)**

Action	Basic Mode	Extended Mode	Context
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
New record	CTRL + ALT + N	CTRL + N	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 (in list)	CTRL + ALT + A	CTRL + A	List, form
Undo record	CTRL + ALT + U	CTRL + U	Record
About record	CTRL + ALT + K		Application
Advanced sort	CTRL + SHIFT + O		List
Columns displayed	CTRL + SHIFT + K		List
Connect	CTRL + SHIFT + W		Application
Default action		CTRL + ENTER	List, form
Display <i>Online Help</i>	CTRL + ALT + H	CTRL + H	Screen
Logout	CTRL + SHIFT + X		Application
New correspondence	CTRL + SHIFT + L	CTRL + L	Record
Open Search Center	CTRL + SHIFT + F	CTRL + F	Application
Reports	CTRL + SHIFT + R		Screen

**Table A-1. Command Shortcuts (2 of 2)**

Action	Basic Mode	Extended Mode	Context
Send email	CTRL + ALT + 1	F9	Record
Send fax	CTRL + ALT + 2	CTRL + F9	Record
Send page	CTRL + ALT + 3	SHIFT + F9	Record
Synchronize calendar	CTRL + ALT + 0		Application
Synchronize database	CTRL + ALT + 5		Application
Technical support	CTRL + ALT + J		Application
Refresh browser	CTRL + R		Application

**Table A-2. Navigation Shortcuts**

Action	Basic Mode	Extended Mode	Context
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

**NOTE:** These keyboard shortcuts come with your Siebel application. If your system administrator has reconfigured these shortcuts, your keyboard shortcuts will be different. Speak to your Siebel administrator if you encounter any difficulties using these shortcuts.



## Simple Query Operators

When you create a query, you use operators or conditions, which are used to search the database for matching records. In [Table B-1](#) and [Table B-2 on page B-4](#), operators are shown in uppercase; however, query strings are not case-sensitive, and the operators do not have to be in uppercase.

**Table B-1. Simple Query Operators (1 of 3)**

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.	<p><i>*rang*</i> finds <i>arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle</i>, and so on.</p> <ul style="list-style-type: none"> <li>■ You cannot use * to find dates.</li> <li>■ 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).</li> </ul>
?	Wildcard operator. Placed anywhere in a string, returns records containing the characters specified in the string plus one additional character, such that any character may appear at the location of the question mark.	<p><i>?rag</i> finds <i>brag, crag, or drag</i>, but not <i>bragging</i>.</p> <p><i>t?pe</i> finds <i>type</i> and <i>tape</i>, but not <i>tripe</i>.</p>

**Table B-1. Simple Query Operators (2 of 3)**

Operator	Description	Example
" "	Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for groups of words in their exact order.	"Sun Solaris" finds records that contain <i>Sun Solaris</i> in the query field.
=	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 <i>Smith</i> .
<	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 less than 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 value of the query field is greater 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 value in the query field is not 20 June 2001.<>Paris finds all the records in which the value in the query field is not <i>Paris</i> .
< =	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 <i>500</i> .
> =	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 <i>500</i> .
LIKE, like	Placed before a value, returns records containing the value.	LIKE Smi* finds all records in which the value in the query field starts with <i>Smi</i> .

**Table B-1. Simple Query Operators (3 of 3)**

Operator	Description	Example
NOT LIKE, not like	Placed before a value, returns records not containing the value.	NOT LIKE <i>Smi</i> * finds all records in which the value in the query field do not start with <i>Smi</i> .
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.
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.

**NOTE:** If performance is poor when using “\*”, substitute “IS NOT NULL” into your query. This often improves the performance, and will return the same sets of records.

## Compound Query Operators

When you create a compound query, you must use parentheses to control the order in which the search for matching records is performed.

**Table B-2. Compound Query Operators**

Operator	Description	Example
AND, and, &	Placed between values, returns only records for which all conditions are true.	<code>performance AND memory</code> finds all records that contain both <i>performance</i> and <i>memory</i> in the query field.  <code>disk &amp; crash</code> finds all records that contain both <i>disk</i> and <i>crash</i> in the query field.
OR, or,	Placed between values, returns records for which at least one condition is true.	<code>performance OR memory</code> finds all records that contain either <i>performance</i> or <i>memory</i> in the query field.
NOT, not, ~	Placed before a value, returns only records not containing the value.	<code>performance NOT memory</code> finds all records that contain <i>performance</i> but not <i>memory</i> in the query field.  <code>performance ~ capacity</code> finds all records that contain <i>performance</i> but not <i>capacity</i> in the query field.  <code>NOT (performance OR memory)</code> finds all records that contain neither <i>performance</i> nor <i>memory</i> in the query field.
()	Surrounds the values and operators that will be processed first, regardless of the default processing order.	<code>(sun OR moon) AND NOT stars</code> returns records that contain <i>sun</i> or <i>moon</i> , but not <i>stars</i> .

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