



# **Documentation Update for *Applications Administration Guide, MidMarket Edition***

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This Documentation Update applies to the following versions of *Applications Administration Guide, MidMarket Edition*.

**Document Versions:**

[Version 7.0, Rev. A](#)

[Version 7.0, Rev. B](#)

**Date Published:** January 2002, March 2002

**Software Version:** Siebel 7, v7.0.4

# Version 7.0, Rev. A

## Chapter 2, Getting Started

July 31, 2002

### About the Sample Database

*Add the following paragraph as paragraph three on page 2-10.*

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

## Chapter 3, Initial Setup

### Setting Up Employees and Employee Skills

April 30, 2002

*For the procedure To set up a position, in the table describing the fields in the position administration view, change the text in the indicated row to the following:*

<b>Field</b>	<b>Description</b>
End Date	<p>This is an informational field only, indicating the last day that the currently associated employee should to be associated with this position, but does not drive any action within the database.</p> <p>You cannot make a position obsolete by setting the End Date. This field records only the end date for the current employee associated with the position. It does not make the position obsolete after that date has passed.</p> <p>Deleting positions could cause problems with Assignment Manager in cases where the position had been set as primary for an account and you didn't update the account with a new primary when you deleted the position.</p>

For the procedure To set up an employee, in the table describing the fields, add the following row:

Field	Description
Configuration	Specifies which Siebel product or group of software components to associate with the currently selected employee. For more information, see <i>Siebel Anywhere Administration Guide</i> .

## Organizations and Organizational Skills

**March 12, 2002**

Replace the Caution at the bottom of page 3-10 with the following:

**Caution:** It is recommended that you do not change the name of the default organization. It is seed data and is referenced in many places. If your company decides to change the default organization name, you must be aware of the following:

- The default organization must have a name which is unique from any other organization or division names.
- If you are using Siebel Workflow, you need to rename references in Assignment Objects to the new name for Default Organization. For more information about these procedures, see *Siebel Tools Reference, MidMarket Edition*.

## Financial Components

**April 30, 2002**

In the procedure To define a currency, add the following row to the field description table in step 2:

Extended Scale	The value in the Extended Scale field for the Currency business component determines the number of decimal places used for storing currency data in the database, while the number of decimal places displayed in the interface is controlled by the value in the Scale field. If the values in the Extended Scale and Scale fields are different, results of currency calculations, for instance conversions or discounts, may be different than expected. This is because the currency values that are stored in the database are used for these calculations, rather than the displayed values. The Extended Scale field can be exposed in the Currency List applet through Siebel Tools.
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For information about exposing fields in the UI, see *Siebel Tools Reference*.

## Setting Up Predefined Queries

**March 12, 2002**

*On page 4-4, add these bullet items to the list:*

When setting up queries, keep these things in mind:

- The administrator can define a PDQ for either displayed or nondisplayed fields.
- Predefined queries are defined on a business object. All screens based on the same business object will display all the predefined queries created for that business object.

## Using Keyboard Accelerators

**March 12, 2002**

*On page 4-40 add the following text, directly after the Setting Up Email, Fax and Mail Accounts (Contact Us) section:*

Keyboard enablement allows users to operate the Siebel employee applications using sequences of keystrokes as an alternative to the mouse for executing commands and navigating through the application. This is accomplished through the use of keyboard accelerators, specific sequences of keystrokes that are mapped to commands within the Siebel application environment. Typically, these key sequences are combinations of the Ctrl, Alt, and Shift keys, along with standard alphanumeric keys.

A full set of keyboard accelerators ship with the Siebel employee applications. Accelerators are defined in Siebel Tools and are fully configurable, although care should be taken when modifying accelerators.

Much of the default keyboard enablement provided natively by Web browsers is also available for use in the Siebel applications. For example, users can navigate sequentially through enterable fields within the application views with the Tab key.

Some examples of useful keyboard accelerators are:

- 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

## Modes of Operation

Keyboard enablement is available in two modes: basic mode and extended mode. Extended mode keyboard enablement gives maximum flexibility in defining accelerators since any key sequence may be mapped to Siebel commands. However, extended mode keyboard accelerators may not be available to all users. Basic mode keyboard enablement is accessible to any user running the Siebel applications in high-interactivity mode. Each accelerator defined in the Siebel Repository can be specific to one keyboard enablement mode, or it can be common to both modes. For a complete list of basic and extended accelerators available, see *Fundamentals, MidMarket Edition*.

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**NOTE:** Both basic and extended mode keyboard enablement require that the Siebel applications are running in high-interactivity mode. It is possible that a few applets within the Siebel applications will not enable high-interactivity mode due to special applet functionality, even if high-interactivity mode is in effect for the applications in general. In these cases, keyboard enablement will not be active when the user is working within one of these specialized applets.

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### Extended Mode

Extended mode keyboard enablement is the default mode of operation for Siebel applications. Applications running extended mode keyboard enablement can map any key sequence to Siebel commands. This includes key sequences that have default interpretations native to the browser in use (for example, Ctrl + N opens a new browser window in late versions of Microsoft Internet Explorer). In cases where both the active Siebel application and the active browser have the identical key sequence mapped, the Siebel applications will “win” in extended mode. Extended mode keyboard enablement also allows accelerator key sequences to include special keys, such as function keys and the arrow keys.

To provide accelerator access to all available key sequences, extended mode keyboard enablement uses a lightweight ActiveX control to capture keystrokes in the browser. Presence of the control is detected automatically and the control is loaded only if necessary. Once loaded, the control is automatically maintained. It will not be loaded again unless an upgraded version becomes available on the application server.

In order for keyboard enablement to be active in extended mode, the following conditions must be met:

- The line “ExtendedKeyboard = TRUE” must appear in the [SWE] section of the configuration file for the active application.
- The user’s browser must be able to accept and correctly interpret the ActiveX control used to capture key sequences.

- Each client browser must accept the lightweight ActiveX control used to capture key sequences. Acceptance of the control may be “silent,” or it may require the user to explicitly accept the control depending on browser security settings. If current browser security settings prohibit downloading of ActiveX controls, the browser security settings will need to be modified to allow ActiveX controls.

## Basic Mode

Basic mode keyboard enablement is accessible to all browser clients running the Siebel applications in high-interactivity mode. No ActiveX control is required to support basic mode. The functional differences between basic mode and extended mode keyboard enablement are:

- Key sequences mapped natively by the current browser will take precedence over Siebel keyboard accelerators mapped to the same key sequences. For example, Ctrl + N in version 5.5 of Microsoft Internet Explorer will open a new browser window regardless of accelerator mappings for Ctrl + N in the Siebel applications.
- Basic mode keyboard accelerators cannot include special keys in their mapped key sequences. Special keys include, but are not limited to, function keys and arrow keys.
- Keyboard enablement will be active in basic mode if either of the following is true:
  - The line “ExtendedKeyboard = FALSE” appears in the [SWE] section of the configuration file for the active application.
  - The current browser does not support extended mode keyboard enablement.

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**NOTE:** Siebel applications use automatic browser detection to determine if a browser is capable of supporting extended mode keyboard enablement. If the current application is configured to run extended mode keyboard enablement but the browser on a particular client does not meet the minimum requirements, the application will be started with basic mode keyboard enablement in effect.

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To configure new keyboard accelerators or modify existing ones, please see *Siebel Tools Reference, MidMarket Edition*.

# Chapter 4, Ongoing Application Administration Tasks

## Modifying a List of Values

**September 30, 2002**

*On page 4-15 replace the second bullet of the Caution with the following text:*

- Some lists of values are for use only by the internal Siebel application and should not be modified. For example, the List of Values SOURCE\_TYPE (Internal) and list-of-values types that include REPOSITORY in the Type field name are for internal use only.

## Constrained Lists of Values

**March 7, 2003**

*On page 4-21 add the following text:*

The procedure below describes how to add a new Area called CIC and a new Subarea called Fax & Data to the drop-down lists in the example.

### **To add new LOV values to Type = SR\_AREA LOV**

- 1** From the application-level menu, choose View > Site Map > Applications Administration > List of Values.
- 2** Query for Type = SR\_AREA and Parent LIC = External.
- 3** Copy one of these records, set the Display Value and Language-Independent Code fields to CIC, and set Parent LIC field to External.

This is to make sure this LOV appears in the Area drop-down list.

- 4** Copy this record, set the Display Value and LIC fields to CIC, and set Parent LIC field to NULL.

This is to make sure this LOV appears in the Parent LIC drop-down list.

- 5** Create a new record and set the Type field to SR\_AREA, the Display Value field to Fax & Data, and Language-Independent Code field to Fax & Data, and the Parent LIC field to CIC.

# Chapter 7, Correspondence

## Configuring Additional Merge Fields

**July 31, 2002**

*Add the following paragraph to the note on page 7-20.*

You can configure up to 63 additional merge fields; WinWord does not display fields beyond this limit.

## Installing Third Party Applications

**April 30, 2002**

*Replace step 2 in this section with the following text:*

- 2 Install Microsoft Project or Lotus SmartSuite using a Typical, or complete, installation. Verify that your version of Microsoft Office will install the Web Authoring Tools (HTML) component with the Typical installation. If it does not, you will need to use the Custom installation option, and install all of the typical components as well as the Web Authoring Tools (HTML) component.

## Synchronizing Components

**March 12, 2002**

*Please delete the following text on page 7-7:*

### ***To synchronize components using the Server Manager***

- 1 Start the Server Manager.
- 2 Enter the command:  

```
servrMgr> sync comps
```
- 3 Restart the server.

## Working With Correspondence Templates

**March 12, 2002**

*Replace all the paragraphs in the introductory section on page 7-11 with the following text:*

Siebel correspondence templates are created and edited in Microsoft Word (\*.doc file format) or Lotus WordPro (\*.lwp file formats). Templates contain one or more merge fields, which are placeholders that will be populated with variable information from your Siebel database, such as a Contact's name and address, when users generate a correspondence for one or more recipients.

Users can create their own personal templates, and administrators can create templates for users. To modify or add a template, Microsoft Word or Lotus WordPro must be installed on your computer.

The data source for Word or WordPro merge fields that are available to be included in Siebel correspondence templates is in the `Siebel.html` file. Administrators can augment the set of merge fields available using Siebel Tools. For information, see "Configuring Additional Merge Fields," on page 7-19.

Guidelines for working with correspondence templates include the following:

- One correspondence must be generated before the `Siebel.html` file will appear for the first time.
- A template must contain at least one merge field in order to generate a correspondence.
- Each time a user clicks Generate or Generate Label, the `Siebel.html` file is overwritten.
- Each time a user clicks Generate or Generate Label, the variable data in the data file replaces the merge fields in the `Siebel.html` file, based on the template format chosen, and a customized correspondence document is created for each recipient on the list.
- The `Siebel.html` file is located in the Reports subdirectory on the Siebel Server.

---

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

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For information about which versions of Microsoft Word or Lotus WordPro are supported, see *Siebel Release Notes MidMarket Edition* and *Siebel System Requirements and Supported Platforms MidMarket Edition*.

*Add the following Caution to the end of the introductory section on page 7-11:*

**Caution:** If you are going to make changes to a template in the Correspondence Template view, it is recommended that you make the template inactive prior to modifying it. You make the template inactive by unchecking the Active field. This will prevent other users from attempting to create Correspondences using this template at the same time you are modifying it. After you have finished your modifications, check the Active field again.

## Adding a Correspondence Template

**March 12, 2002**

*Add the following note on page 7-13 at the end of the introduction.*

---

**NOTE:** You may create a new correspondence template for a variety of purposes: for a company description, as a mailing label, and so on.

---

## Modifying and Renaming the Template

**March 12, 2002**

*Replace the text of step 5 on page 7-14 with the following:*

- 5** In the Open Data Source dialog box, check the Select Method option and then locate and open the \Siebel\Reports\Siebel.html file.

## Inserting Files into Correspondence Templates

**March 12, 2002**

*Replace the section on page 7-17 with the following text:*

The Siebel Correspondence file insertion feature allows you to insert one or more files into a correspondence template.

You may insert file templates containing generic content into one or many correspondence templates. For example, you can create a company description in a separate file insert template and then include it into correspondence templates. If the description changes, you only have to modify the single insertion template instead of every template.

The administrator or user may add a comment indicating that the file is an insert template that should be used by mail merge and inserted into other documents.

You may insert as many files into a correspondence template as necessary. Each file name must be unique.

Each file must be inserted into the correspondence template independently. Insertion files can not be nested. For example, you may insert `File1.doc`, `File2.doc`, and `File3.doc` into a template named `FollowUp.doc`. But, you may not insert `File1.doc` into `File2.doc`, and then insert `File2.doc` into `FollowUp.doc`.

You may insert a file template into a public template created by an administrator or a personal template created by a user. Only Microsoft Word files are inserted into Microsoft Office templates, and only Lotus WordPro files are inserted into Lotus SmartSuite templates. This process is described below.

### **To insert a file into a correspondence template**

- 1** Create the file insert template.
  - a** Using Microsoft Word or Lotus WordPro, create the insert template.
  - b** Under the Document Administration Screen, the Correspondence Templates view, add a new record and add the new insert template.
- 2** Open the Correspondence Template in which the new template file is to be included.
- 3** Insert a separate line with the following command at the location where the insert template is to be displayed:

```
[[<File Name>]]
```

Here, < File Name > is the name of the file created in Step 1.

- 4** Save the Correspondence Template locally and then reload the template back into the Correspondence Template View.

At run time, the new insert template will merge with the Edited Correspondence Template.

## **Chapter 10, Forecasting**

### **Revenue Spreadsheet Applet Configuration**

**April 30, 2002**

#### **Column Types**

*Add the following text after the final paragraph:*

The 'Add Column' button in the Spreadsheet view enables users to dynamically add a new date column. The new column must be a valid date, such as 1/1/01. Upon the creation of the new date column, a new revenue record on the List View is automatically created with all of the appropriate default values consistent with the parent record, for instance, Opportunity Name or Account Name.

## Inactivating Automatic Creation of Missing Subordinate Forecasts

**April 30, 2002**

By default, the system preference Forecast: Auto-Forecast is set to true. This means that subordinates' forecasts are automatically created if the subordinates have not created the forecasts themselves.

### **To inactivate automatic creation of missing subordinate forecasts**

- 1 From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2 In the System Preferences list, select the Forecast: Auto-Forecast record.
- 3 Change the System Preference Value to FALSE.
- 4 Restart the server.

## Chapter 13, Siebel Messages

**November 7, 2002**

### Setting Up Message Workflow

Replace the procedure on page 13-3 with the following:

#### **To set up message workflow and mail manager from a command line**

- 1 Login to the server using Server Manager. Use a command of the following format:

```
siebroot\siebsrvr\bin\>srvmgr /g gateway /e enterprise_name /u db_username /  
p password /s siebserver
```

For example,

```
D:\10689-1\siebsrvr\bin\>srvmgr /g evlab6 /e siebel /u sadmin  
/p sadmin /s evlab6
```

- 2 At the command prompt, enter a command in the following format to start the Generate Triggers component:

```
start task for component GenTrig with EXEC=True , Remove=False , PrivUser=  
'privileged_user', PrivUserPass= 'privileged_user_password'
```

- 3 At the command prompt, type the following to check to make sure the Generate Triggers task has finished:

```
list task for comp gentrig
```

The status should appear as completed.

- 4 At the command prompt, enter a command in the following format to run Workflow Monitor:

```
start task for comp workmon with Groupname='Siebel Messaging'
```

- 5 At the command prompt, enter a command in the following format to start the Mail Manager component:

```
start task for comp mailmgr with mailprofile='profile_name'
```

## Chapter 14, Campaigns

**March 7, 2003**

### Setting Up Campaigns

*On page 14-10, replace the Total Cost row in Table 14-2 with the following:*

Total Cost	Click in the field and use the calculator controls to enter the total cost of the campaign. This value does not include the rollup of costs for subcampaigns.
------------	---

### Opportunity Revenue Analysis

*On page 14-39, replace the second paragraph with the following:*

When using the chart, Opportunity Revenue Analysis by Campaign, only campaigns set to response type Opportunity are used to create the chart.

## Chapter 16, eCampaigns

**March 12, 2002**

### Modifying Response Types

*Delete the entire “Modifying Response Types” section on page 16-18.*

This section should be deleted because Response Types created on the Communication Response View are not available for use in the application (for example, in embedding in emails or Web offers), nor can existing Response Types be modified. The New Record button on the applet level menu is disabled by default, but can be enabled through Siebel Tools, by changing the Communication Response List Applet's property No Insert to False.

## Chapter 17, List Management

### Managing External Lists

**April 30, 2002**

*Replace the second paragraph under this heading on page 17-5 with the following text:*

List Import is also integrated with Siebel Data Quality so that incoming records can be cleansed and matched against all existing contacts and prospects in the database. This helps the user avoid creating duplicate records for any incoming prospects that may already be customers.

---

**NOTE:** Siebel Data Quality is an optional module. For information about Siebel Data Quality, see *Siebel Data Quality Administration Guide, MidMarket Edition*.

---

### Importing External Lists

**April 30, 2002**

*Replace the second bullet point under this heading on page 17-6 with the following text:*

- Allows you to control the matching and address cleansing settings applied by Siebel Data Quality, if your company uses this optional module.

*On page 17-6 replace the words Server Request Manager (in a bulleted list in this section) with the following text:*

Server Request Broker

**November 7, 2002**

*On page 17-6 add the following note:*

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**NOTE:** After a list import, the imported records remain in the EIM\_PRSP\_CON interface table, causing it to grow with every import. These records should be deleted periodically at times when no list import or EIM Task for this interface table is running, using standard SQL truncate or delete commands like `DELETE FROM <table_owner>.EIM_PRSP_CON where IF_ROW_BATCH_NUM > 100000000;`

---

## List Import Modes

**April 30, 2002**

*Replace the introductory sentence under this heading on page 17-10 with the following text:*

List Import provides four modes for importing an external file. The first three modes require the optional Siebel Data Quality module. For more information see *Siebel Data Quality Administration Guide, MidMarket Edition*.

## Viewing Lists of Contacts or Prospects

**April 30, 2002**

*Add the following note to page 17-23, at the end of this section:*

---

**NOTE:** You can remove a contact or prospect from a list using the Contact Lists View or Prospect Lists View. When you remove a prospect from a list, it is actually deleted. However, when you remove a contact, the action only removes the association with the list. For more information refer to the earlier section, “Deleting Prospects from Lists.”

---

## List Management Overview

**March 12, 2002**

*Add the following note on page 17-3, after the text in the introductory section:*

---

**NOTE:** For creating lists with over 5,000 records, it is recommended that you use Siebel Enterprise Integration Manager. For more information, see *Siebel eBusiness Application Integration Guide MidMarket Edition*.

---

# Chapter 19, Service Requests and Solutions and Chapter 21, Agreements and Entitlements

March 12, 2002

On pages 19-9 and 21-4, replace tables 19-2 and 21-1, “System Preferences for Verifying Entitlements,” with the following:

System Preference Name	Description
Entitlement: Verify Consumer	<p>This setting sets the conditions for checking the authorization of the contact requesting service. If TRUE, the entitlements displayed must meet <i>one</i> of these criteria:</p> <ul style="list-style-type: none"><li>■ The contact for the entitlement matches the service request contact.</li><li>■ The entitlement account is set to All Contacts, and the entitlement account matches the service request account or the account for the contact for the service request.</li></ul>
Entitlement: Verify Dates	<p>This setting checks that the service request falls within the time span of the entitlement. If TRUE, the entitlements displayed are only those that provide coverage on the date the service request was opened: a date between the start and end dates for the entitlement.</p> <p>If the entitlement has no start or end date, it is not displayed.</p>
Entitlement: Verify Product	<p>This setting checks that the asset or product is entitled to service. If TRUE, the agreements displayed must meet <i>one</i> of these criteria:</p> <ul style="list-style-type: none"><li>■ The entitlement asset matches an asset in the service request.</li><li>■ The entitlement product matches a product in the service request (no asset or serial number specified).</li><li>■ The entitlement is set to All Products and the product or asset for the entitlement matches the product or asset for the service request.</li></ul>

# Version 7.0, Rev. B

## Chapter 2, Getting Started

July 31, 2002

### About the Sample Database

*Add the following paragraph as paragraph three on page 2-10.*

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

## Chapter 4, Ongoing Application Administration Tasks

### Modifying a List of Values

September 30, 2002

*On page 4-15 replace the second bullet of the Caution with the following text:*

- Some lists of values are for use only by the internal Siebel application and should not be modified. For example, the List of Values SOURCE\_TYPE (Internal) and list-of-values types that include REPOSITORY in the Type field name are for internal use only.

### Constrained Lists of Values

March 7, 2003

*On page 4-21 add the following text:*

The procedure below describes how to add a new Area called CIC and a new Subarea called Fax & Data to the drop-down lists in the example.

#### **To add new LOV values to Type = SR\_AREA LOV**

- 1 From the application-level menu, choose View > Site Map > Applications Administration > List of Values.
- 2 Query for Type = SR\_AREA and Parent LIC = External.

- 3 Copy one of these records, set the Display Value and Language-Independent Code fields to CIC, and set Parent LIC field to External.

This is to make sure this LOV appears in the Area drop-down list.

- 4 Copy this record, set the Display Value and LIC fields to CIC, and set Parent LIC field to NULL.

This is to make sure this LOV appears in the Parent LIC drop-down list.

- 5 Create a new record and set the Type field to SR\_AREA, the Display Value field to Fax & Data, and Language-Independent Code field to Fax & Data, and the Parent LIC field to CIC.

## Enabling Application-Wide Case Insensitivity for Siebel Dedicated Web Client

**July 31, 2002**

*Add step 4 to the procedure on page 4-45, as follows:*

- 4 Stop and restart the Siebel server.

For more information, see “Modifying the Insensitivity Factor Parameter.”

## Chapter 7, Correspondence

### Modifying and Renaming the Template

**July 31, 2002**

*Replace step 5 of the procedure on page 7-15 with the following.*

- 5 In the Open Data Source dialog box, locate and open the \Siebel\Reports\Siebel.mdb file.

### Configuring Additional Merge Fields

**July 31, 2002**

*Add the following paragraph to the note on page 7-19.*

You can configure up to 63 additional merge fields; WinWord does not display fields beyond this limit.

# Chapter 18, Campaigns

**March 7, 2003**

## Setting Up Campaigns

*On page 14-10, replace the Total Cost row in Table 14-2 with the following:*

---

Total Cost	Click in the field and use the calculator controls to enter the total cost of the campaign. This value does not include the rollup of costs for subcampaigns.
------------	---

---

## Opportunity Revenue Analysis

*On page 14-39, replace the second paragraph with the following:*

When using the chart, Opportunity Revenue Analysis by Campaign, only campaigns set to response type Opportunity are used to create the chart.