



Documentation Update for *Fundamentals, MidMarket Edition*

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This Documentation Update applies to the following version of *Fundamentals, MidMarket Edition*.

Document Version: Version 7.0, Rev. A.

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Software Version: Siebel 7 v7.0.3

Chapter 1, Overview

March 13, 2002

Add the following information after “Browser Security Settings” on page 1-4:

Exiting the 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.

Chapter 2, Siebel Application Window

Application-Level Menu

March 13, 2002

Add the following table below the Help menu description on page 2-4:

Table 1-1. 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 “ Spell Checking ” on page 3-24. |
| About SRF | Opens the About SRF dialog box which provides detailed technical information about the software repository file associated with the Siebel application you are running. |

Table 1-1. Help Menu Commands

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

Filtering a set of records

January 3, 2002

Update the following table entries in Table 2-1, *Show Drop-Down Filters on page 2-11*:

| Filter | Description |
|-------------------------|--|
| All Accounts | This allows you to see every account in the database to which you have access. |
| View Other's Activities | 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 that user has given you update access in his or her Calendar Access list. |

Chapter 3, Records and Fields

March 13, 2002

Using Record Hyperlinks

Add the following beneath the *Tip on page 3-13*:

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.

Add the following section to the end of Chapter 3.

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.

Chapter 4, Search and Query

Query Tips

March 13, 2002

Add the following to page 4-6:

- You cannot query on Notes view when you are connected to the server.

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.

Query Operators

January 3, 2002

The following information should appear below Table 4-1, Common Query Operators, page 4-5:



Caution: All query operators are reserved Siebel query language. If you create a query which contains a query operator in it acting as regular text, 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*.

Chapter 5, Communication Tools

Importing and Exporting

March 13, 2002

Add the following paragraph and note on page 5-10:

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.

Importing and Exporting

January 3, 2002

The following replaces the first note under Importing and Exporting on page 5-10:

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.

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

Calendar

March 13, 2002

The following replaces the existing paragraph about the calendar's show less mode on page 5-15:

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 7-12](#). 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.

The following are additions to the Calendar section:

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.

Printing Your Calendar

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.

Chapter 6, Customization

March 13, 2002

User Preferences

Add the following note beneath Figure 6-2 on page 6-5:

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

Appendix B, Query Operators

March 13, 2002

Update the third row on page B-3 as follows:

| | | |
|-----|---|---|
| < > | 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> . |
|-----|---|---|