



Siebel Pharma Handheld Guide

Version 7.8

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1

What's New in This Release

What's New in Siebel Pharma Handheld

Table 1 lists descriptions of the changes made to this version of the documentation to support Release 7.8 of the software.

Table 1. What's New in Siebel Pharma Handheld, Version 7.8

Topic	Description
"Configuration Guidelines for Siebel Handheld" on page 20	Revised and expanded the general guidelines, including screen and view design, for configuring Siebel Handheld applications.
"Performing Setup for Initial String Translation" on page 31	Revised setup procedure for allowing translation capability in Siebel Handheld applications.
"Configuring Signature Capture Capabilities in Siebel Handheld" on page 36	Revised and expanded this topic with information on enabling signature capture, signature display, and the Signature Capture applet control user properties.
"Creating Siebel Handheld Views" on page 47	Revised procedures for creating new views in the Siebel Handheld applications and adding those views to a user's responsibilities.
"About Thread Throttling" on page 51	Added new topic describing the method for allowing the maximum number of concurrent synchronizations.
"Configuring Application Settings for Siebel Handheld" on page 53	Added new topic describing parameter settings in the Administration - Mobile screen.
"Administering Barcode Settings for Siebel Handheld" on page 58	Revised and expanded this topic with information on enabling barcode scanning, mapping a button for the Socket In-Hand Scan Card, and creating barcode definitions.
"Acting Upon Synchronization Errors in Siebel Handheld" on page 69	Added descriptions of user options after encountering synchronization errors.
Data Filtering "Constructing Business Component and Business Object Filters" on page 88 "Examples of Default Business Object Declarations" on page 90	Revised and expanded Data Filtering chapter with examples of business component filter syntax, business object filter syntax, and default business object declarations.

Table 1. What's New in Siebel Pharma Handheld, Version 7.8

Topic	Description
Logging Levels "Configuring Direct Server Sync Logging Levels" on page 98 "Configuring Companion Sync Logging Levels" on page 99	Added information on Logging Level parameters and how to configure them.
"Providing Synchronization Security with Secure Sockets Layer" on page 101	Added information on securing the synchronization data stream by using Secure Sockets Layer (SSL).
"Editing the Handheld Application Installation Configuration File" on page 102	Revised and expanded this table of setup.ini parameters and their descriptions.
"Changing the SyncURL on Siebel Handheld Devices" on page 108	Updated information on using SyncURL to allow communication between the handheld synchronization client and the handheld synchronization server.
"Preventing Synchronization Transaction Conflicts with Siebel Handheld" on page 113	Revised the information on Extended Pick processing and handling Insert Failure processing.
"Using Companion Synchronization with the Handheld Client" on page 136	Revised information on performing Companion Sync, including Integrated Sync.
"Companion Sync Checklist" on page 184 "Direct Server Sync Checklist" on page 185	Revised troubleshooting information to help users determine why or when a synchronization has failed.
"Log Files" on page 186	Revised this section on logs and output files to include information on logging Siebel Handheld synchronization errors.
"SQLTrace" on page 188	Added information on enabling and using SQL tracing.
"PrinterType" on page 239	Revised the list of supported printers for Siebel Handheld.

2

Overview of Siebel Pharma Handheld

This chapter includes the following topics:

- [“About Siebel Handheld” on page 13](#)
- [“Overview of Siebel Handheld Synchronization” on page 14](#)
- [“Siebel Handheld Synchronization Methods and Architecture” on page 14](#)
- [“Overview of Siebel Handheld Client Application Configuration” on page 15](#)

About Siebel Handheld

Siebel Handheld provides a focused subset of functionality to that of the Siebel Web Client. The Siebel Handheld Client differs from the Siebel Web Client and the Siebel Mobile Web Client in that it uses a selected subset of views, accommodates smaller screen sizes, and has a reduced memory capacity. For a list of functional differences, see [Chapter 3, “Application Development.”](#)

Some features that are available on the Siebel Mobile Web Client are not available on the Siebel Handheld. Scripting and Siebel engines (for example, Pricing and Reporting) are not supported on the handheld. For a list of features that are not supported, see [“Unsupported Features for Siebel Handheld” on page 18.](#)

Some supported features of the Siebel Handheld client are as follows:

- **Application Development with Siebel Tools.** Siebel Handheld applications can be configured in Siebel Tools using the Web Applet Designer. You can take your existing Siebel application and use this as the basis for the Siebel Handheld application, or you can create a new application by using the Siebel Tools application shipped on the Siebel Handheld application DVD. See [Chapter 3, “Application Development,”](#) for more information.
- **Data filtering.** Filtering allows you to specify a subset of data to be used on the handheld device. Filtering is an important feature of a Siebel Handheld deployment because of the relatively large size of the average enterprise database in comparison to the relatively limited memory capabilities of handheld devices. It is important that you allocate sufficient time in the project plan to create and test the handheld filters. See [“Application Development” on page 17](#) for more information.
- **Installation options.** The Siebel Handheld application can be installed on Windows-powered devices in one of two ways. The first is to create a partnership between a desktop or laptop PC and the handheld device using Microsoft ActiveSync. The second is to install the Siebel Handheld application from external media, for example, a Cabinet (CAB) file. Handheld patches can be remotely deployed using PatchAgent. For more information, see [Chapter 8, “Installing the Handheld Application.”](#)

- **Patch Updates.** Siebel Handheld automatically applies the latest software patches to the handheld device when needed. Companion Sync allows users to Synchronize the Handheld Database to the local database on Companion PC and invokes Siebel Remote to synchronize the local database with the server database.

PatchAgent automates the deployment of patches to handheld devices as part of the synchronization process. For more information on PatchAgent, see [“Installing the Siebel Handheld Application from External Media” on page 108.](#)

- **Backing Up and Restoring Data.** The Siebel Handheld application provides database backup functionality. A database restore utility is also included with the application. See [“Enabling Handheld User Database Backup” on page 105](#) for details.

Overview of Siebel Handheld Synchronization

The Siebel Handheld Synchronization (Sync) client synchronizes data between the Siebel Handheld database and the Mobile Web Client database or server database. The synchronization process does the following:

- Updates the Siebel server database with changes made to the Siebel Handheld database
- Updates the database on the handheld device with changes made to the Siebel server database
- Downloads metadata changes, such as object definitions for new or modified screens or views
- Allows users to select filters to limit the amount of data that is downloaded
- Automatically applies the latest software patches to the handheld device when needed

Siebel Handheld Synchronization Methods and Architecture

The following methods can be used to synchronize data on the handheld device with data in the Siebel server database: Companion Sync (CS), Direct Server Sync (DSS) and Direct Server Sync via Proxy (DSSvP). The architecture of these methods is discussed in the following sections.

Handheld Synchronization

A Handheld synchronization server component run on the Siebel application server can accept concurrent synchronization requests from multiple synchronization clients. When connecting directly to a server, the Siebel Handheld Sync client synchronizes its data directly to a server database. Companion Sync allows users to synchronize the Handheld Database to the local database on a companion PC device and invokes Siebel Remote to synchronize a local database with the server database.

In Direct Server Sync mode, the Siebel Handheld Synchronization client uses the HTTP(S) protocol over a network connection to communicate with the handheld synchronization server. Users should configure their handheld devices for communication over the desired network.

A companion synchronization server runs on a companion personal computer with a Mobile Web Client installation and supports synchronization with a data source specified in a client configuration; the database resides on the companion PC.

Companion Sync

Companion Sync allows users to synchronize the Siebel Handheld application and database with a Siebel Remote database on a Mobile Web Client.

Microsoft ActiveSync is used to connect the handheld device and the companion PC through a serial or USB connection. The user launches Siebel Handheld Sync from companion PC or the device. The user can change the default filters using Siebel Handheld Sync.

Direct Server Sync

Direct Server Sync allows users to synchronize their Siebel Handheld application and database directly with the Siebel server. The user connects the handheld device to the Siebel application server through a network connection that uses the HTTP protocol. The connection runs through a IIS Web server to the application server, where the Sync server components are installed and running.

Direct Server Sync via Proxy

Direct Server Sync via Proxy (DSSvP) allows users to synchronize their Siebel Handheld application and database directly with the Siebel server. The user connects the handheld device to the Siebel application server through ActiveSync and the network connection established by the companion PC. The connection runs through a IIS Web server to the application server, where the Sync server components are installed.

Overview of Siebel Handheld Client Application Configuration

The following provides an overview of the configuration process of the Handheld client. Complete the following steps to configure your handheld client application.

To configure the Siebel Handheld client

- 1 Define the user functionality.

Determine which user interface elements (such as screens, views, toolbars, applets, find, and help) will be necessary for your Siebel Handheld Client end users. For more information, see [“About Defining User Functionality in Siebel Handheld” on page 20](#).

2 Configure the Siebel Handheld Client user interface.

The process for configuring user interface elements in the Siebel Handheld Client is the same as that for other Siebel clients. For more information, see [“Configuring User Interface Elements in Siebel Handheld” on page 25](#) and *Configuring Siebel Business Applications*.

3 Identify all eScript or VB script.

Siebel Handheld applications do not currently support scripting, including eScript or VB script. Scripting used in your Siebel application may conflict with your Siebel Handheld application configuration.

4 Compile the new configuration.

For more information, see [“Compiling the Siebel Handheld Application” on page 30](#).

5 Test the new configuration.

Test the configuration, repeating the previous steps, to address any configuration errors.

After completing the Siebel Handheld Client configuration, you are ready to install it on the handheld devices. To install the Siebel Handheld configuration on a handheld device, see the instructions in [“Installing the Siebel Handheld Application” on page 121](#).

3

Application Development

This chapter includes the following topics:

- [“Overview of Siebel Handheld Architecture” on page 17](#)
- [“Unsupported Features for Siebel Handheld” on page 18](#)
- [“About Defining User Functionality in Siebel Handheld” on page 20](#)
- [“Configuration Guidelines for Siebel Handheld” on page 20](#)
- [“About Creating Siebel Handheld Projects” on page 22](#)
- [“Designing Screens and Views for Siebel Handheld” on page 23](#)
- [“Configuring User Interface Elements in Siebel Handheld” on page 25](#)
- [“Scripting in the Siebel Handheld Client” on page 29](#)
- [“Compiling the Siebel Handheld Application” on page 30](#)
- [“Configuring Printing from the Siebel Handheld Application” on page 33](#)
- [“Configuring Signature Capture Capabilities in Siebel Handheld” on page 36](#)
- [“Testing the Siebel Handheld Application” on page 43](#)

Overview of Siebel Handheld Architecture

The process for configuring a Siebel Handheld Client has a few differences, described in this chapter, from the process for configuring other types of Siebel clients.

NOTE: Readers should familiarize themselves with the Siebel client configuration process described in *Configuring Siebel Business Applications* before attempting to configure the Siebel Handheld Client.

The five layers in the Siebel Handheld architecture are comparable to those used on the Siebel Web Client:

Application layer. The application layer starts and closes the application.

User Interface layer. The user interface layer renders the display and interacts with actions of the user.

Object Manager layer. The object manager layer provides a consistent object behavior and interaction between all business objects within the application.

Data Manager layer. The data manager layer maintains an object-oriented abstraction of the native data stored in the data repositories for the benefit of the object manager.

Database layer. The database layer includes the data that Siebel Handheld users access.

Your Administrator configures an application on the Siebel client using Siebel Tools and compiles the Siebel repository (.srf) file. During the synchronization process, information specific to the Siebel Handheld Client is extracted from the Siebel repository file. This information is used to create a repository metalanguage (.rml) file, which is downloaded to the handheld device.

The repository metalanguage file contains the layout information for the handheld device but not the database layer. The database layer is generated in the transport file called dbfile.txt, which is downloaded and imported to the handheld database (siebelDB.sdf).

For more information on Siebel Tools, see *Using Siebel Tools*.

Unsupported Features for Siebel Handheld

The differences between configuring user interface elements for the Siebel Web Client and the Siebel Handheld Client are shown in [Table 2](#).

Table 2. Configuring Siebel Client User Interface Elements

Client	Siebel Tools	SWT Template Files	Specialized Algorithms
Siebel Web Client	Yes	Yes	No
Siebel Handheld Client	Yes	No	Yes

The following are not supported in Siebel Handheld applications:

- The following applet types are not supported:
 - Chart
 - Explorer
- Group boxes are not supported. See [“Group Boxes” on page 26](#) for more information.
- Alarm Manager is not supported. Therefore, if an alarm check box is added to an applet and the check box is selected, no alarm sounds.
- The base time zone is determined by the system settings on the server and cannot be changed on the handheld device.
- Alphabet tabs are not supported.
- Scripting is not supported. However, any scripts on the business components will be executed during synchronization.
- Siebel Workflow is not supported.

See the following topics which outline, more specifically, other unsupported features.

Multi-Value Groups (MVG)

The Multi-Value Group applet is not supported on the Siebel Handheld Client; however, the Multi-Value Group relationship is supported. The Multi-Value Group (MVG) control button does not appear on fields in Siebel Handheld Client applications. Instead, MVGs can be implemented as parent-child views. As a result, MVG fields are not editable within the parent record. In the Siebel Web Client, addresses of accounts are added, deleted, or edited through the Business Address MVG applet. However, in the Siebel Sales Handheld Client, these functions must be done through a Business Address child applet with an Account applet as its parent.

On the handheld device, all MVG fields are displayed as read-only, with the primary record visible. The first record will be displayed if the primary record is not specified. If you have an application or business requirement that requires the user to view or update all the records in the MVG, you must configure a separate view for that MVG. For example, the Address field in the Accounts or My Accounts view is an MVG. In the Siebel Handheld Client that field is read-only and displays the primary record. In order for the handheld user to see and update the addresses, the new Address view is configured in Siebel Tools. This new Address view is visible in the Show drop-down list.

Functions

Siebel Handheld applications support most of the calculated fields and operations used in the Siebel Web applications with a few exceptions. See [Table 3](#) for a list of the unsupported functions.

Table 3. Unsupported Functions

Function Name
BCHasRows
DockingNodeId
DockingNodeName
DockingNodeRouteId
EAILookupExternal
EAILookupSiebel
EXISTS
GetHQInstanceId
GetHQInstanceName
GetNumBCRows
GetProfileAttr
GetXAval
IsDocked
LanguageName
LocaleName

Table 3. Unsupported Functions

Function Name
LookupMessage
LookupTranslation
NOT
RepositoryId
RepositoryName
RowIdToRowNum
ToolsLanguage

The NOT key word is not supported on Booleans. Use the != operator instead. For example, "Active" != "Y".

The RowIdToRowNum function is supported differently in the handheld applications than in the Web applications. In Web applications, RowIdToRowNum converts a row Id to a numeric value. In the handheld applications, the row ID itself is returned.

About Defining User Functionality in Siebel Handheld

The first step in configuring a Siebel Handheld Client is to determine which user interface elements are necessary. Siebel Handheld Client users have different requirements from Siebel Web Client users. Keep in mind the differences in display size, memory capacity, and input methods between handheld devices and larger computers, such as desktop computers.

The goal is to create applications that are easy for your end users to use and which take advantage of the strengths of the handheld device platform. Because of processing speed, memory limitations, and form factor differences, you should only include those user interface elements that are necessary for users to complete their job responsibilities.

Configuration Guidelines for Siebel Handheld

There are a few general guidelines you should bear in mind when configuring for the Siebel Handheld application. Use these guidelines when you design any new objects for the Siebel Handheld Client. This approach facilitates a logical separation of the Siebel Handheld Client user interface elements from the Siebel Web Client user interface elements.

- Identify User Activities
 - To conserve memory (and thereby improve performance) and ease navigation, identify business processes that are required by end users and develop applications that support these processes.

- If more than one type of user needs a Siebel Handheld Client application, it is preferable to divide the application into multiple responsibilities rather than give all possible users access to all available screens and views. Responsibilities are fully configurable by the application developer.
- Do not include additional functionality that is not required to reside on the device.
- Limit the number of screens and views
 - Keep the number of views in your application to 30 or fewer. Determine critical business processes that the handheld will support and only pick the views that are necessary and are compliant with your business requirements.
 - Limit the number of views within a screen to 12 or fewer to keep the View drop-down list concise.
 - Limit the number of screens to 6 or fewer to keep the Screen drop-down list concise.
 - Keep screen names to about 15 characters or fewer, so that they fit in the Screen drop-down list. The number of characters is a general guide because characters vary in width.
 - Keep view names to about 30 characters or fewer so that they fit in the View drop-down list. The number of characters is a general guide because characters vary in width.

- Limit the number of applets for each view

Design each view so that it has one or, at most, two applets. Limiting the number of applets enhances performance, and enriches the user experience.

NOTE: Some views contain three applets. Use the toggle button to navigate between the two child applets.

- Limit the number of columns and fields for each applet to minimize scrolling

Consider the following when designing your applets:

- Design applications that contain as few screen and view hierarchy levels as possible. In a Web-based application, you may have views with many applets, and the user toggles between the applets. However, for handheld applications, create more views with fewer applets to allow users to quickly find information with a minimal amount of toggling.
- Include the most important fields and columns that a user needs to see at a glance before scrolling. For example, if you have a form applet that is a parent, include only needed fields to avoid scrolling.
- If you are using a list applet, determine how wide it needs to be.
- Design each applet so that it only contains columns and fields that are required for end-user tasks.
- Consider moving required and editable fields into visible area of the applet where users can enter data and would not have to scroll. Because there is less screen space on a handheld device than on a laptop or desktop, the most important data should be immediately visible.
- The Date Column can be formatted to show only the date instead of Date and Time where Time is not relevant. This saves the user from having to scroll.
- To minimize horizontal scrolling, limit the number of columns displayed in a list applet to no more than ten.

- There is no limit on the number of fields in form applets of single-applet views. However, to minimize scrolling, keep the number of fields to 20 or fewer.
- Use a form applet for the parent for each parent-child view.
- In a multi-applet view, limit the number of fields in form applets to five or fewer. Add additional fields only if the field width is short. For example a check box field.
- Reduce the number of fields if the fields are multi-line, for example, a Comments box that contains three lines of text.
- Do not include read-only check boxes in form applets. It is very difficult for users to discern that the check box is not editable.
- Do not add pick applets or set the Runtime property to true for Read-Only fields that have a picklist value associated to them. This will improve overall extraction time, synchronization time and dbfile.txt file size since the process will not be forced to extract all the picklist values for these fields.
- Keep query names to about 15 characters or fewer, so that they fit in the Queries drop-down list. For example, North American Organization is too long for a query name, so you should change it to a shorter name, such as N. American Org. The number of characters is a general guide because characters vary in width (for example, W is wider than i).
- For each screen, create a single-applet More Info view. Create this applet as a form applet. For example, for the Contacts screen, create a More Info view that has the Contacts form applet only.
- For each screen, create a view called My * or All * as a single list applet view. For example, for the Activities screen, create a My Contacts view that has the Contacts list applet only.
- Design Data Filters
 - Limit the size of the dbfile.txt file to less than three megabytes (MB). The RDBMS on the handheld device is approximately three times the size of dbfile.txt. If the data files are so large that they cannot be imported into the database with the available memory, users cannot successfully synchronize their data. See [Chapter 5, "Data Filtering"](#) for information on how to design data filters to limit the amount of data that is synchronized to the handheld.
 - When working with assessment creation functionality, you need to name your templates in such a way that they will filter only the needed templates that will be downloaded to the device. Without properly setting up filters, all templates will be downloaded to the device.

About Creating Siebel Handheld Projects

The Siebel Handheld projects appear in the list of projects in Siebel Tools; when Project is selected in the Object Explorer, the list of projects is displayed in the Object List Editor.

Use a naming convention that allows you to easily identify applications, screens, views, and applets belonging to a particular Siebel Handheld application. This allows you to locate all the object definitions in a Siebel Handheld application by querying on the name in the Object List Editor. For example, all of the Siebel Handheld Client screens, views, applets, toolbars, and menus use either an SHCE prefix (for example, SHCE Sales Account List view) or a CE suffix. Use the Object List Editor to query for views that contain the prefix SHCE or the suffix CE; doing so displays all of the Siebel Handheld Client views.

If you create a new Siebel Handheld application, create a new suffix or prefix to identify the name of the application and each screen, view, and applet name. For example, you could use PPC_SHCE for an application.

Designing Screens and Views for Siebel Handheld

Each view in a Siebel Handheld application can display a maximum of two applets at a time, regardless of the number of applets in the view. If there are more than two applets in a view, the user can navigate to additional applets by toggling.

Screen Allocation

The amount of screen space available for applets is determined by the type of applets in the view. Two applets are stacked above one another. A parent form applet in a two-applet view displays multiple fields on a screen. Users use the scroll bar to navigate. The form applet dynamically resizes if there are fewer than five fields and, therefore, does not waste screen display space with empty lines. The maximum number of fields that are displayed at one time is configurable by setting the Max Parent Applet Size preference in the User Preferences dialog. See [“Setting User Preferences in the Siebel Handheld Application” on page 133](#) for more information on this user preference.

Toggling Between Multiple-Applet Views

The Siebel Handheld Client application displays up to two applets at one time. If the view has only one applet, the applet takes up the entire display area. For views with two or more applets, the first two applets in the view are displayed, and the user toggles to see the other applets. The first applet is always displayed and the second applet changes as you toggle.

By default, the user toggles by choosing the View > Toggle menu item. In addition, it is recommended that you provide a toggle button as a visual cue to the end user that there are additional applets. Add a toggle button to each applet except the first applet. Identify the button with a Toggle caption and set methodInvoked to ToggleApplet.

Drill-Down Only Views

Some views may be drill-down only views—that is, they can only be accessed by navigating from another view. These views should not be accessible through the Show drop-down list. However, when the end user navigates to the view, the view title appears in the Show drop-down list. To configure a drill-down only view, set the view title as you would for any other view and set the ScreenMenu property to FALSE. See *Configuring Siebel Business Applications* for more information.

Applet Focus Behavior

When navigating between views, there may be instances when you need to override the default behavior for giving focus to an applet.

The `GotoView` method is used to navigate from one view to another. A button control is added to the applet in the view you want to navigate from, the button's `methodInvoked` property is set to `GotoView` and the button's `View` property is set to the view that is to be created. When the `GotoView` method is executed, it builds the specified view. If the view includes a parent and child applet, `GotoView` gives focus to the child applet. This is the desired behavior in most instances when you are simply navigating from one view to another.

If the desired behavior is to navigate to a new view and, additionally, to create a new record, then you must use the `GotoViewNewRecord` method. This method calls two methods; first it calls `GotoView`, and then it calls `NewRecord`, which creates a new record in the new view.

In some instances the default behavior of these methods does not produce the intended behavior. For example, in the Orders view of the Service Requests screen, when you tap the Create New Order button, it takes you to the Order Details view, which contains a parent form applet (Service Request Order) and a child list applet (Service Order Entry Line Item). In this instance, when the Create New Order button's `GotoViewNewRecord` method is executed, you want a new order to be created. However, the default behavior is to give focus to the child applet rather than creating a new record in the parent applet. Therefore, you need to override the default behavior of `GotoView` with the control user property `OverrideDefaultApplet`, and set the value to the applet that you want to give focus. The valid values are 0 (parent) and 1 (child). For example, if you create a button labeled "Create Service Request Order," you would define user properties shown in [Table 4](#):

Table 4. User Properties

Name	Value
View	SHCE Service Order Line Items View
OverrideDefaultApplet	0

Views with Associated Print Templates or Reports

Print templates are text files that you design and create for printing. After creating a print template, you associate it with an applet. When an end user chooses to print from a view, the print template that is associated with the applet is automatically selected and used for printing. Follow these guidelines when creating print templates:

- Only one print template can be associated with an applet.
- The print template name for a particular display applet is registered in the Mail Template property in the Applet object associated with the applet.
- The template must be placed in the Templates directory.
- The template name that goes into the Mail Template property should not include a path name or extension. For example, if the full path of the template is `\Program Files\Siebel Handheld\Templates\InvoiceTemplate.txt`, you would enter only the root name `InvoiceTemplate` in the property field.

- The template file itself must have a .txt extension on the device.

For more information, see [Appendix F, "Print Configuration Settings."](#)

Configuring User Interface Elements in Siebel Handheld

When configuring user interface elements on the Siebel Handheld Client, also consider the processing speed and memory constraints of handheld devices. The constraint on processing speed affects the performance of a handheld device. The performance of a handheld device is also related to the number of screens and views downloaded to the handheld device. Because handheld devices are not meant to provide the same functionality as larger devices, such as laptops, the number of screens and views must be kept to a minimum on the handheld device.

Due to size constraints on handheld devices, the Siebel Handheld Client displays user interface elements differently from the Siebel Web Client. Consider these differences when configuring the Siebel Handheld Client application. For example, Siebel Handheld Client does not support an alphabetical index.

Configuring List Applets for the Handheld Client

You configure list applets and list columns for Siebel Handheld applications the same way you configure them for other Siebel applications.

Recommended Strategy for Configuring List Applets

The recommended strategy when configuring the Siebel Handheld Client is to use the list applets for record navigation and to rely on form applets to provide the record details.

The following are additional guidelines to follow when designing list applets:

- Configure specific list applets for your Siebel Handheld application, rather than reusing Siebel Web Client list applets.
- Remove all but the essential list columns. Because there is limited screen area to display list columns, omit all unnecessary columns to minimize horizontal scrolling.

You may either remove the columns from the application or set the Show in List property on the column to FALSE. These two methods are different in the following ways. If the columns are removed from the application, these data won't be downloaded to the handheld device, which keeps the handheld data and a minimum and, in turn, optimizes synchronization performance. If the Show in List property on the column is set to FALSE, the data is still downloaded to the device but is not shown by default. This second approach, though without the synchronization optimization benefit, does allow convenience for the user who wants to customize visible columns. You should take these concerns into account when setting up users.

- Reorder the remaining list columns so that the most frequently used columns are furthest to the left.

- Reduce the default width of the list columns so that more columns can be viewed at one time.
- Use hyperlinks to ease navigation by enabling users to drill into a form applet.

These changes can minimize the amount of horizontal scrolling and column reordering that users must do. Limiting the number of list columns to those that are essential minimizes the amount of data downloaded to the device, resulting in faster synchronization times and more economical use of device memory.

NOTE: All required fields on form and list applets appear with an asterisk (*). If an administrator specifies that a field is required, the field appears with an asterisk in the user interface.

Use Siebel Tools to modify, or rearrange List Columns. For more information on the List Column options, see *Configuring Siebel Business Applications*.

Configuring Form Applets for the Handheld Client

The handheld uses a specialized algorithm to format and display form applets. Due to the display limitations on the device, only one pair of label and field controls are displayed on each row of the form, regardless of the layout shown within Siebel Tools.

Layout Sequence

When configuring for the handheld device, the Applet Web Template Items in the Applet Web Template determine the controls that appear on a form applet. The layout of form applets on the handheld device is determined by the HTML Sequence field set on control objects.

The HTML Sequence field determines the screen layout of a handheld device. Controls are ordered from top-to-bottom based on their HTML Sequence property values. Label and control pairs that do not fit on the same line as other label and control pairs wrap to the next line.

Labels

Keep field labels in applications short (approximately 12 characters or fewer, depending on the character width). Use abbreviations where possible. Labels that are too long are truncated.

Group Boxes

Group boxes are not supported and are not displayed in form applets, even if they are added in the Web Applet Designer. Therefore, reword the field labels to include group box information if necessary. For example, you may have two group boxes on the form, one labeled Ship To and another labeled Bill To. Each group box includes a field named Address. Because group boxes are not supported, the Ship To and Bill To labels are lost, and two fields with the identical Address label remain. Therefore, you must rename the Address labels "Ship To Addr" and "Bill To Addr" or some other label that distinguishes them.

Using Auto Pop-Up Lists in the Handheld Client

Sometimes when a user encounters a new view, he or she must perform an action, such as filling in a required field by selecting a value from a pop-up list. Rather than requiring the end user to tap the control to open the pop-up list, you can configure the view so that the pop-up list automatically opens when the end user gets to that view. To configure a pop-up list to open automatically, add the user property on the applet with Name set to AutoPopupField. Depending on the type of applet, this property is set differently:

- For list applets, set the AutoPopupField property to the Business Component field name.
- For form applets, set the AutoPopupField property to the name of the control.

About Home Page Applets in Siebel Handheld

To configure a Home Page applet, create an applet that has controls of HTML Type Button only. Use the following guidelines in creating your Home Page applets:

- Set the MethodInvoked property of these controls to GotoView. Then add a user property for the control, and set the Name parameter to "View" and set the Value parameter to the view name.
- Set the Caption field.
- Set the HTML Sequence field according to the order in which the buttons are laid out on the device. The buttons appear on the Home Page applet of the handheld device, laid out in rows of three buttons.
- Set the class property of the Applet to CSSFrameCEHome.

About Buttons in Handheld

Set the HTML Type field on buttons to Button, MiniButton, PushButton, or MiniButtonEditNew. All of these HTML Types map to the same button control on the handheld device.

Buttons with text labels on them are sized to the minimum width required to fit the text on the buttons.

NOTE: You cannot use scripting to augment the button functionality in handheld applications.

You may add buttons as long as the method invoked is supported by the class or superclass of the frame or business component. You may also remove buttons from an applet. Be careful when removing buttons because you may alter the behavior of your application in unintended ways. [Table 5](#) describes the behavior of buttons on the different screens. Use this table to guide your decisions about removing buttons from your handheld applications.

Table 5. Button Functionality

Screen	View	Button	Button Functionality
Accounts	Views	Measurements	Goes to the Asset Measurements view.
Accounts	Views	Warranties	Goes to the Asset Warranties view.
Accounts	Views	Components	Goes to the Asset Sub-Components view.
Browser	Views	Check Substitute	Checks for substitute parts for the current part. Navigates to the Part Browser Substitutes view.

About the Menu Bar in Handheld

The menu object definition in the Siebel repository that is implemented in handheld applications is named SHCE Generic. The default menu bar configuration for the Siebel Handheld Client includes the following menus: File, Edit, View, and Help. You may remove or rename menus on the menu bar, but you cannot add new menus. You may reorder the menu items by changing the Position property for the menu items. Generally, use the default menu bar configuration for all of your Siebel Handheld Client applications.

About Toolbars in Handheld

This section describes how to configure the toolbar for your application.

Table 6 shows the supported toolbar functions.

Table 6. Supported Toolbar Functions

Toolbar Functions
Back, Forward
New Record
New Query, Execute Query
Next Record, Previous Record, First Record, Last Record
Minimize/Maximize
Delete Record

The default toolbar can be configured in Siebel Tools by configuring the SHCE Main toolbar object. SHCE Main is the main toolbar that is downloaded to the handheld device. If a toolbar named SHCE Main does not exist in your repository, a default toolbar, *Main*, is downloaded instead.

The SHCE Main toolbar contains the default buttons for the device: Back, Forward, New Record, New Query, and Execute Query. Change the order of the buttons on the display by modifying the Position property of the toolbar items. Remove a toolbar button by deleting it or making it inactive.

You can add additional default buttons to the toolbar by creating toolbar items whose Command property matches the name of an active bitmap in the SHCE Command Icons bitmap category. Do not add bitmaps to the SHCE Command Icons bitmap category because only those commands, which are already provided, are supported on the device. No additional commands are supported. You can remove a bitmap or make a bitmap inactive if you do not want it to appear in the Customize Toolbar dialog box.

You can change the bitmap for a toolbar by reimporting the bitmap from the SHCE Command Icons bitmap category.

An end user can personalize the toolbar by selecting View > Toolbar.

For more information on toolbars, refer to *Configuring Siebel Business Applications*.

About the Status Bar in Handheld

The status bar is located above the toolbar. The status bar displays the status of an applet with focus, including the applet title and record item count (for example, Contacts: 1 of 13).

About Hyperlinks in Handheld

Configuring a drilldown, or clicking a hyperlink or dynamic hyperlink in the Siebel Handheld Client, is performed the same way as with other Siebel clients. For more information on configuring drilldowns, see *Configuring Siebel Business Applications*.

Scripting in the Siebel Handheld Client

The Siebel Handheld Client does not execute Siebel Visual Basic (VB) or Siebel eScript scripting.

The Siebel Handheld Client application runs Siebel VB or Siebel eScript scripts and specialized business component logic at synchronization time, rather than in real time on the handheld device. This has significant consequences in applets and controls, because scripts attached to applets and controls are ignored.

CAUTION: Be aware of the following additional issues with respect to scripts and validation:

- **Deactivating scripts.** Do not deactivate existing scripts in Siebel Tools to make the handheld device or the synchronization process accept data it is excluding. Errors may occur within the Siebel Web Client or elsewhere where these scripts are run.
- **Calls to user interface methods.** When a business component script makes a call to a user interface method (such as MsgBox), the script cannot be executed, and the record update, deletion, or addition is rejected during synchronization. Strictly speaking, a script attached to a business component should not interact with the user interface.

Any Siebel Visual Basic code should be restricted to the business component level. Applet-level Siebel Visual Basic will not execute and, therefore, should not be written for the Siebel Handheld Client application. As a substitute to using Siebel Visual Basic on the Siebel Handheld Client application, for real-time execution, use the following business component user properties:

- BC/Field Read Only Field...for making fields or business components read-only dynamically.
- Pickmap for fields on the picklist.

Do not use message boxes or prompts in the Siebel Visual Basic code used in conjunction with the Siebel Handheld Client application business components. If the business component is shared between the Siebel Handheld Client application and a laptop, use the following construct to determine if the code is being executed in real time on the laptop or during synchronization:

```
'ActiveViewName is only available when the script is called real time on the laptop  
If (TheApplication.ActiveViewName<>"") then  
MsgBox"....."  
End If
```

- Business component level scripting will be executed during synchronization. Error handling may need to be enhanced if the business component is shared between the handheld application and the laptop.

Compiling the Siebel Handheld Application

Compiling the repository for the Siebel Handheld Client is identical to compiling on the Siebel Web Client. For more information, see *Using Siebel Tools*. For deployment to production, always perform a full compilation. This assumes that you have organized all of your handheld object definitions in one project or a limited set of projects.

When you compile your application, a Siebel repository file (.srf) is created and put in the destination directory you specified during the compile procedure. Make this .srf file the source of repository information for the Siebel Handheld test client machine, defining all Siebel applications for that client, when you move it to your local \Siebel\objects directory.

It is strongly recommended that you make a backup of the existing .srf file in your local \Siebel\objects directory before overwriting it with the new one. That way, if you make an error or you want to revert to the original application, you have a backup that you can easily restore. Versioning for the repository is tracked, and if the .cfg, schema, or repository files have changed, the sync process will automatically rebuild the .rml and schema. For more information, see *Using Siebel Tools*.

Installing and Setting Up End User Translation Functionality

End User Translation functionality provides you with the ability to translate the text strings within the Siebel Handheld application. The translation process should be undertaken during the development cycle and once completed your development team can then package the translated strings for distribution.

The translation process requires the generation of a file of strings from the handheld binaries which are then translated and distributed to the user base. This file, `userstr.txt`, containing the translated strings is then used to override the strings within the existing handheld binaries. Therefore, you will be required to build a copy of `userstr.txt` into the installation media for your handheld application.

The translation string file is version specific so you must repeat this process every time you upgrade your Siebel Handheld application.

Performing Setup for Initial String Translation

In order to perform the initial string translation you must perform the following steps prior to installation:

To setup Siebel Handheld application for initial string translation

- 1 In the Handheld installation directory, add the following two lines to the `setup.ini` file

```
[EndUserLocalization]
```

```
UserDefinedLang=Y
```

- 2 Install the Siebel Handheld application.

During application initialization and the subsequent startup, the file `'userstr.tmp'` is generated within the `ApplicationDataDirectory` (by default this is `\Program Files\Siebel Handheld`). This file is generated upon startup whenever the `UserDefinedFlag` is set to `Y` within the handheld registry and an existing `userstr.txt` cannot be found.

- 3 Copy the generated file over to the computer where you will be performing the string translation.

- 4 Translate the strings as required and remove any untranslated strings from the file.

For example, given the following section of exported strings:

```
33872|HTML\  
33873|Tab delimited text file\  
33874|Export\  
33875|Format: \  
33876|Only Active applet\  
33877|All applets in view\  
33878|Output file name\  
33879|Browse...\  
33880|And paste output to clipboard\  
33881|And open file\  

```

Translate the required strings and remove any untranslated strings as follows:

```
33873|Archivo delimitado por tabulaciones\  
33874|Exportar\  
33875|Formato: \  
33876|Sólo el applet activo\  
33877|Todos los applets de la vista\  
33878|Nombre del &archivo de salida: \  
33880|Y pegar salida en el &portapapeles\  
33881|Y &abrir el archive  

```

NOTE: Strings 33872 and 33879 were removed from the userstr.txt as they were not required to be translated.

- 5 Save the file as userstr.txt in a UNICODE file format and then copy back into the ApplicationDataDirectory on the handheld device.
- 6 After restarting the Siebel Handheld application, the translated strings are read from userstr.txt in place of the strings included in the handheld binaries.

Distributing Translated Strings

Once you have generated and tested the userstr.txt file of translated strings, you should include this file in the installation media for the Siebel Handheld application.

To distribute translated strings

Create a new language sub-directory named `UserDefinedLanguage` within the Siebel Handheld installation directory from which end user devices are installed and which contains the `setup.exe`.

This directory with the name `UserDefinedLanguage` will exist alongside the language sub-directories shipped with the application. The new `userstr.txt` file should be placed in this subdirectory.

Upon installation of the Siebel Handheld application, the custom file will be placed in the `ApplicationDataDirectory` of the destination device along with the usual handheld files.

Configuring Printing from the Siebel Handheld Application

Users may print from any view in the application. However, they are not necessarily printing what they see on their screen. They may print a portion of the data they view or data that is not viewable at the time.

A print template defines the document that is to be printed. After the template has been defined, it must be associated with an applet in a view.

This section provides information on the following topics:

- Defining documents
- Designing print applets
- Configuring applets for printing
- Creating print buttons
- Creating print templates

Defining Documents for Handheld

Defining documents for printing includes several steps:

- Determine the documents your users need to print.
- Determine the views from which they are most likely to print the documents.
- Lay out the document for printing.

Determining which documents users will need and the views from which they are most likely to print requires that you have a good understanding of the users' day-to-day work.

Whether the existing applets in a view include most of the required data or only a small portion is a secondary consideration. It is not likely that a printout of the existing applets, which are formatted for an electronic PDA interface, will provide an acceptable or usable printed document. In most instances, you need to create additional applets that are specifically used for printing data.

The printed document will be composed of several applets which are added to the view. The applets pull the data from the underlying business components. These applets, in turn, direct the data to the print templates discussed in [Appendix E, "Print Tagging Language."](#)

Designing Print Applets for Handheld

The print template references applets associated with the view and is how you specify what data appears in the printed document. For information on print templates, see [“Creating Print Templates for the Handheld Application” on page 36](#). As you design your applets, you should be aware of the print specifications of the printers used in the field. Portable printers typically print on two-inch or four-inch wide paper. You need to design your applets so that the data fits within the limits of the paper width. Keep your documents simple so that they work with different sizes of paper. The following are some guidelines to use when designing your applets to accommodate the smaller paper sizes.

Form Applets

Data from only one business component can be displayed on each line in your document. When you design your form applets, keep in mind that you can display a maximum of two columns of data in form applets. You can specify that each column of data is preceded by an optional caption column. This means you can have up to four columns displayed in your document—two data columns and two caption columns. Alternatively, you may have no captions, and simply display one or two columns of data.

The ratio between caption and data columns is, respectively, 35 percent and 65 percent. This is a fixed relationship that cannot be customized in the template.

Limitations on multiple columns in printed output are largely hardware dependent. In printing 7 fields on a 40 column printer, physical limitations allow only 4-5 characters per field $(40 - (7-1))/7 = 4.85$. To print more than 4 columns, an 80 column printer is recommended. Generally, the capabilities of impact printers are lower than those of Thermal printers.

List Applets

When specifying the width of a column, you can either specify it with a unit of measurement or as a percentage of the total page width. For example, you can specify that the first column is 20 mm, and the second column is 40 mm. If the width of the paper you print to is narrower than 60 mm, the column widths automatically adjust to fit the printable width as a proportion of the specified width. Therefore, the first column will always be 33 percent, and the second column will be 67 percent of the paper width. The minimum width for a column is 8 mm, which includes a 3 mm gutter margin between columns.

You can specify any number of columns in your list applet. However, if the width of the column is less than 8 mm, the application ignores the column and does not print it.

On narrow paper widths, data from a field may not all fit on one line. Data that does not fit can be specified, in the Applet tag, to wrap to the next line and keep wrapping until the data in that field is completely displayed. The printable width of the page is equal to the paper width minus the left and right margins ($\text{PaperWidth} - [\text{LeftMargin} + \text{RightMargin}]$). These parameters are set in the setup.ini file. For more information on setting these parameters, see [Appendix F, “Print Configuration Settings.”](#)

Configuring Applets for Printing for the Handheld Application

Configure print applets as you would any other applet using Siebel Tools. In addition, set the following properties for each applet in the view.

- Set the HTML Popup Dimension value to 0x0.

The 0x0 setting hides the applet from the end user who should not see the applet that is used to generate the document. Exposing these applets would complicate a product that is tightly configured for an effective and efficient workflow on a small mobile device.

NOTE: For compatibility with previous versions, Siebel Systems continues to support the name, *Popup Dimension*, for this property. However, it is recommended that you use *HTML Popup Dimension*.

- Set the name of the Mail Template to be the name of the print template file. For more information on the print template file, see [“Creating Print Templates for the Handheld Application” on page 36](#). For more information on the Mail Template property, see [“Views with Associated Print Templates or Reports” on page 24](#).

Configuring Print Buttons for the Handheld Application

While users can use the File > Print menu option to print a document, it is helpful to include a Print button on the applet to give users a visual reminder that it is possible to print from a particular view.

When you design your applets, keep the following in mind when deciding where to place the print button:

- Add the print button to the applet that is visible to the user. Do not add the print button to the print applet, which the user never sees.
- Consider what the desired behavior is when determining the placement of a print button.

For example, in a parent-child view, you may want to add the print button to the parent applet to ensure that the print button is always enabled. This is not necessarily true if the print button is placed on the child list applet. If there are no items in the list applet, the print button is disabled, and the end user cannot print from that view. If you only want the end user to print when there are list items, then placing the button on the child list applet is appropriate.

To configure a print button

- 1 From Siebel Tools, add a control to the print applet and specify HTML Type = Button.
- 2 Set Method Invoked = Print.
- 3 Set the Display Name property of the button. Generally, this is set to Print.

Creating Print Templates for the Handheld Application

Once you have identified and created the necessary views, you are ready to create print templates. A print template is a text file that includes instructions for printing a document. It specifies the data to be printed, document layout options, and text formatting. These instructions are specified using a print tagging language that is described in [Appendix E, "Print Tagging Language."](#)

Configuring Signature Capture Capabilities in Siebel Handheld

You can configure the Siebel Handheld Application to capture, view, and print signatures. The following sections provide details on configuring signature capture:

- ["Enabling Signature Capture" on page 36](#)
- ["Invoking Signature Capture Dialogue Box and Display" on page 37](#)
- ["Signature Capture Dialogue Box and Signature Display" on page 37](#)
- ["Configuring Signature Capture in Activities More Info View in Siebel Handheld" on page 38](#)
- ["Adding a Signature Capture Button in Siebel Tools" on page 40](#)
- ["Signature Capture Applet Control User Properties" on page 41](#)

NOTE: This feature allows customers to develop their custom signature capture capability on Siebel Handheld. It can not be used to edit or change the Pharma Handheld signature capture preconfigured functionality, which allows you to capture signatures for samples disbursed. For more information on configuring Pharma Handheld signature capture for samples disbursed, please refer to ["User Properties for Signature Capture Verification" on page 74.](#)

Enabling Signature Capture

Enabling signature capture requires implementing the required supporting field and column definitions, adding a signature control to the applet and, if required, configuring an applet button through which the signature capture dialogue box can be invoked. A field can be configured as a signature control in any list or form applet. Multiple signature controls can be added to a single applet. Once captured, signatures are converted to an ASCII encoding data and stored with the Siebel database as ASCII text.

When enabling Signature Capture, the following basic configuration is required:

- The Business Component field mapped to the signature control should be of Type DTYPE_NOTE
- The underlying Table Column on which the Business Component field is based on Physical Type LONG

- The Applet Control should have a Control User Property called "Signature" with a value "Y". The Control's HTML Type property should be set to "Field"

NOTE: The Applet Control by default does not redisplay the signature data if there is data in the underlying business component field. In this case, you will see the field as read only and will not be able to see the signature that was captured. To redisplay signatures, add another Control User Property called "Show Data" with a value "Y". With this additional configuration, the control is still read-only, but you will be able to see the signature that was captured. For a full list of User Properties available for configuring signature capture, see ["Signature Capture Applet Control User Properties"](#) on page 41.

Invoking Signature Capture Dialogue Box and Display

There are two ways to invoke the Signature Capture dialogue box or Signature Display. By default, the basic configuration specified in the Enabling Signature Capture section allows you to invoke the signature capture dialogue box or display a signature using the (...) ellipses button.

You may also use the following basic configuration to invoke the Signature Capture dialogue box or display with the Applet Signature button.

- Create a new Control with properties HTML Type = MiniButton, Method Invoked = StartSignature
- Add a Control User Property to the MiniButton control to indicate the signature field in the business component (for example, the field that is being used to store signature in the business component on which the applet is based).

For examples, see ["Configuring Signature Capture in Activities More Info View in Siebel Handheld"](#) on page 38 and ["Adding a Signature Capture Button in Siebel Tools"](#) on page 40.

Signature Capture Dialogue Box and Signature Display

The Signature Capture dialogue or display box consists of three controls in the client area: header, signature, and footer. A toolbar displays various buttons depending on the existence of signature data.

Initially, when signature data does not exist or has not yet been captured, the user sees a single line of text within the field control that reads Not Signed. Once the signature capture dialogue box or signature display is invoked, this message appears at the bottom of the screen. The Clear and Cancel buttons are also enabled, while the Accept button is disabled. Once the Signature area within the dialogue box is populated, the Accept button is automatically enabled. Table 7 describes the functionality around these three buttons.

Table 7. Signature Capture Dialogue Box Buttons

Button	Description
Accept	Tap this button to commit the signature to the database.
Clear	Tap this button to reset and clear the signature field.
Cancel	Tap this button to discard the signature and close the display.

Once the signature is committed (for example, signature captured and accepted in the database), the user sees a single line of text "x Signed x" within the applet field control.

The Header and Footer is a line or unlimited number of lines of text in one or more paragraphs. The specific Header or Footer values that appear as well as how they appear in the dialogue box is controlled by a set of user properties. See ["Signature Capture Applet Control User Properties" on page 41.](#)

Configuring Signature Capture in Activities More Info View in Siebel Handheld

The following example provides detailed steps to configure signature capture in Activities More Info View in SIA Sales Handheld. The Activities More Info View has one applet 'SIS HH Activity Entry Applet - CE', which is based on the Action Business Component, which in turn is based on S_EVT_ACT Table. The following example shows how to configure a field within the Action Business Component called Signature, which is based on a new column created from S_EVT_ACT_X Table. To enable basic signature capture (for example, no header or footer), follow these steps:

- 1 In Siebel Tools, add an extension column to the table S_EVT_ACT_X.

For this Field	Add This Value
Name	SIGNATURE
User Name	Signature
Type	Extension
Nullable	TRUE
Physical Type	Long

For this Field	Add This Value
Length	0
Cascade Clear	Ignore
Transaction Log Code	TRUE
Status	Active
Sequence	999
Comments	Extension Column for Activity Signature Capture

- 2 Add a field to Action business component with the following values:

For this Field	Add This Value
Name	Signature
Join	X_EVT_ACT_X
Column	SIGNATURE
Text Length	16,383
Type	DTYPE_NOTE
Use Default Sensitivity	TRUE
Comments	Custom Field added for Signature Capture

- 3 Add control to applet. For this example, you will add the control to the 'SIS HH Activity Entry Applet - CE'.

For this Field	Add This Value
Name	Signature
Caption	Signature
Caption String Reference	SBL_SIGNATURE-1005113048-35Y
Field	Signature
HTML Display Mode	EncodeData
HTML Row Sensitivity	TRUE
HTML Type	Field
Runtime	TRUE
Text Alignment	Left
Visible	TRUE
Comments	Custom control added to display and invoke Signature Capture.

- 4 Add two Control User Properties to the new 'Signature' control with the following values:

User Property Name	Value
Signature	Y
Show Data	Y

- 5 Add the new control to the Edit Web Template for 'SIS HH Activity Entry Applet - CE'.

You can now invoke the signature capture dialogue box by tapping on the ellipsis (...) on the signature field on the applet.

Adding a Signature Capture Button in Siebel Tools

Optionally, you can also configure the signature capture dialogue box by placing a button on the applet. The following configuration steps provide details on doing this.

To create a new minibutton control

- 1 Create a new MiniButton control against the 'SIS HH Activity Entry Applet - CE'.

For this Field	Add This Value
Name	SignatureCapture
Caption	Sign
Caption String Reference	SBL_SIGN-1005113047-35W
HTML Type	MiniButton
MethodInvoked	StartSignature
Comments	Custom MiniButton to Invoke Signature Capture.

- 2 Add a Control User Property to the MiniButton control to indicate the Signature field in the business component:

- Name = SignatureField
- Value = Signature

Signature Capture Applet Control User Properties

The user properties, shown in [Table 8](#), are optional and provide you with the ability to modify the style and layout of the Signature Capture applet.

Table 8. Style and Layout Modification Properties

User Property	Description	Sample Value
Signature	If Y the field becomes a signature field	Y
ShowData	If Y, the signature data can be redisplayed. Setting this User Property to 'N' disables the ellipses in the signature applet control, when there is signature data already existing	Y or N
EncryptKey	Encrypt key string. If this is not specified, an internal mechanism is used to generate the encryption key.	1 and 99999999
WritingGuide	Defines appearance of writing guide in signature control.	Y or N
BorderStyle	Defined the border style of the signature control.	Double
InkColor	Defines the ink color. Uses a Hex format (OxBBGGRR) of blue, green, red.	OxFF0000 (Blue)
InkWidth	Defines ink width	2 (Pen width)

The user properties shown in [Table 9](#) are added to support header and footer display and the save function.

Table 9. Header and Footer Display Properties

User Property	Description	Sample Value
SignatureDataField	This property is used to specify a destination field for the captured signature in scenarios where it differs from the current UI field. When specified, it specifies the name of the business component field that the signature data is fetched from and saved to.	SigDataField
SignatureHeaderField	Specifies the name of the BC field from which the header value is fetched.	SigHeader
SignatureFooterField	Specifies the name of the BC field from which the footer value is fetched.	SigFooter
SignatureHeaderSaveField	Specifies the name of the BC field to which the header value is saved.	SigHeaderSave
SignatureFooterSaveField	Specifies the name of the BC field to which the footer value is saved.	SigFooterSave
MaximumHeaderLines	Specifies the maximum height of the header display control in number of text lines. If the header text exceeds this number, the user needs to scroll down the control to view the rest of the header text. (Default = 4).	4
MaximumFooterLines	Specifies the maximum height of the footer display control in number of text lines. If the header text exceeds this number, the user needs to scroll down the control to view the rest of the header text. (Default = 4).	4
SignatureHeight	Specifies the height of the signature capture control by pixels (default = 80, max = 200).	Integer between 1 and 200.
SignatureDate	If set to Y, the current date is appended below the last line of the footer. The date string is saved to footer save field.	Y
SignatureTime	If set to Y, the current time is appended below the last line of the footer to the right of date if date is specified. The time string is saved to footer save field.	Y
ConfirmAccept	If set to Y, a confirmation message is displayed after accept button is pressed. Otherwise, no confirmation message is displayed.	Y

NOTE: If the content of the Header or Footer exceeds the `MaximumHeaderLines` or `MaximumFooterLines`, respectively, then the content can be scrolled vertically using the pen. No scrollbar will be generated.

Testing the Siebel Handheld Application

Before deploying your application to your end users, be sure to thoroughly test the application by synchronizing to a handheld device. The handheld configuration is downloaded to the device where you can test the functionality and verify that you have the desired behavior. Another equally important aspect of handheld testing is to check to see how much data is downloaded to the device. If too many records are downloaded, this increases the length of time it takes to synchronize the handheld device and slows down the application performance. Check the server log file to see how many records are downloaded for each business component. You must turn on logging to capture this information in the log file.

For more information on enabling logging for Direct Server Sync, see [“Configuring Direct Server Sync Logging Levels” on page 98](#).

For more information on enabling logging for Companion Sync, see [“Configuring Companion Sync Logging Levels” on page 99](#).

4

Application Administration

This chapter includes the following topics:

- "Overview of Siebel Handheld Administration Screens" on page 46
- "Setting Up Users in Siebel Handheld" on page 47
- "Assigning User Responsibilities to Siebel Handheld Users" on page 47
- "Creating Siebel Handheld Views" on page 47
- "Setting Business Component Filters for Siebel Handheld Users" on page 49
- "Setting Business Object Filters for Siebel Handheld Users" on page 50
- "Configuring Application Settings for Siebel Handheld" on page 53
- "Configuring Component Level Settings for Siebel Handheld" on page 58
- "Administering Barcode Settings for Siebel Handheld" on page 58
- "About Monitoring Synchronization Sessions for Siebel Handheld" on page 66
- "Monitoring Synchronization Sessions for Siebel Handheld" on page 67
- "Obtaining Error Details from Siebel Handheld Synchronization Sessions" on page 67
- "Obtaining Business Component Information from Siebel Handheld Synchronization Conflicts" on page 68
- "Obtaining an Audit Trail for Siebel Handheld Synchronization Sessions" on page 68
- "Acting Upon Synchronization Errors in Siebel Handheld" on page 69
- "Process for Administering Siebel Pharma Handheld" on page 69
- "Managing Samples Records in Pharma Handheld" on page 70
- "Administering Disclaimer Text in Siebel Pharma Handheld" on page 71
- "Configuring Distributor Names in Siebel Pharma Handheld" on page 71
- "Performing a Signature Audit in Siebel Pharma Handheld" on page 72
- "Verifying Signature Capture in Siebel Pharma Handheld" on page 73
- "Configuring User Properties for Closing Inventory Periods in Siebel Pharma Handheld" on page 75
- "Configuring User Properties for Signature Capture Verification in Siebel Pharma Handheld" on page 76
- "Validation Logic of the Sign and Submit Buttons in Siebel Pharma Handheld" on page 77
- "Validating the DEA Number in Siebel Pharma Handheld" on page 84
- "Preparing Receipts for Calls in Siebel Pharma Handheld" on page 85

Overview of Siebel Handheld Administration Screens

This chapter is designed to show you how to administer Siebel Handheld. Key tasks are outlined that you can perform using the Administration - Mobile screen. Your organization may follow a different task sequence according to its business requirements.

Following are the views used for administering Siebel Handheld applications. You can access the Administration - Mobile screen through either the Siebel Web Client or Siebel Mobile Web Client.

- **Session Administration:** This view contains a detailed information about user synchronization sessions. Use this view to monitor and investigate handheld user synchronization activities.
- **Server Component Administration:** This view allows you to manage server-level settings for synchronization components. These settings are used by the synchronization engine to extract application definition and user data. These settings will override the application-level settings.
- **Application Administration:** This view lists all the handheld applications available within your enterprise. From this view you can create new application settings and administer settings that have already been created. The contents of the following views are used by the synchronization engine to extract application definition and user data.
 - **Business Component Filters:** Use this view tab to change synchronization filter settings for business components. If you wish to restrict the contents of selected business components to reduce the data set otherwise visible to your users, you can change filter settings in this view.
 - **Business Object Filters:** Use this view tab to define business object level filters, which restrict data that is downloaded to the handheld client upon synchronization.
 - **Settings:** Use this view tab to define parameter settings for your application.
- **Conflict Administration:** This view allows you access selected transaction errors.
 - **Audit Trail:** Use this view tab to obtain information about action taken on a particular data conflict. Audit Trail must first be enabled for the conflict data. The business components are Handheld Transaction Error and Handheld Txn Error Message.
 - **Business Components:** Use this view tab to see business component information associated with a particular data conflict.
 - **Error Details:** Use this view tab to get detailed information about specific data conflicts. You are also able to take particular action on any given conflict.
- **Barcode Administration:** This view allows you to create new barcode definitions for your handheld applications.
- **User Administration:** This view allows you to manage user-specific settings, such as business object and business components filters, that filter the data that display to the user. The data sets contained in these user views are used by the synchronization engine to extract application definitions and user data. The Siebel Handheld application is populated by these data when the user performs synchronization. These settings override the server component-level and application-level settings.

- **User Business Components:** Under this view tab, you can set user-specific sync filter directives for business components. These settings override application-level settings.
- **User Business Objects:** Under this view tab, you can set user-specific filters for business objects. In this setting, you limit the data set that is downloaded, at the time of sync, to the Handheld client. These settings override application-level settings.
- **User Settings:** Under this view tab, you can control user-specific settings which override server component-level and application-level settings.
- **Barcode Enabling:** In this view you can enable barcode scanning for chosen views in the Siebel Handheld application. For more information on enabling barcode in your handheld application, see *Siebel Sales Handheld Guide*.

Setting Up Users in Siebel Handheld

To set up users on a Siebel Handheld application, perform the following tasks:

- [“Assigning User Responsibilities to Siebel Handheld Users” on page 47](#)
- [“Creating Siebel Handheld Views” on page 47](#)
- [“Setting Business Component Filters for Siebel Handheld Users” on page 49](#)
- [“Setting Business Object Filters for Siebel Handheld Users” on page 50](#)

Assigning User Responsibilities to Siebel Handheld Users

You must create user accounts and assign responsibilities and passwords for each handheld user. The steps are the same as those for creating user accounts, assigning responsibilities and passwords for the Siebel Web Client. See *Applications Administration Guide* for more information on this topic.

Creating Siebel Handheld Views

The handheld synchronization engine extracts views based on configuration (SRF) and the responsibility set up in the Application Administration view.

To configure a new view in your handheld application, follow the list below. Knowledge of Siebel Tools is required to perform these tasks.

- 1 Create the new view in Siebel Tools. For information on creating views, see *Configuring Siebel Business Applications*.
- 2 Add that view to the handheld screen. For more information on adding views to screens, see *Configuring Siebel Business Applications*.
- 3 Add the screen to the handheld application if required. For more information on adding screens to applications, see *Configuring Siebel Business Applications*.
- 4 Compile the project. For information on compiling projects, see *Using Siebel Tools*.

- 5 Add the new view to the Siebel Handheld user's responsibility. See ["To add a handheld view to a user's responsibility"](#) on page 48.

To add a handheld view to a user's responsibility

- 1 Launch the Web Client application that uses the same database that the Siebel Handheld application synchronizes with.
- 2 Choose Navigate > Site Map > Application Administration > Views.
- 3 Add the new views.
- 4 In the Responsibilities view, associate each view with the appropriate handheld responsibility.
- 5 Add appropriate users to the responsibility.

NOTE: For more detailed instructions on adding views and associating views with responsibilities, see *Applications Administration Guide*.

Specifying Views for the Handheld Application

The Siebel Handheld application uses a small subset of views used in the Siebel enterprise application. Because there are memory resource constraints on handheld devices, it is recommended that you compile an SRF to extract only those views that are used on the device.

The combination of the SRF and the user's responsibility determines which views are extracted. The handheld device only extracts views whose parent screen is included in the handheld application and are part of the user's responsibility.

About Business Component Filters

Business component filters are used in some cases to restrict the size of extractions that otherwise might be excessive. They suppress the extraction of business component records. Business component filters should be employed with discretion because excessive filtering can cause server data integrity problems.

Business component filters can be specified at either the Application level or the User level, but not at the Component level. They should not be specified at the user level outside of your test environment, and once tested should be migrated to the Application level.

If you are configuring for handheld synchronization, a suggested practice, is to start with no business component filters at all. Attempt a sync and even if the sync fails due to excessive data extraction volumes, view the extraction results to determine the business components for which the data extraction was excessive. If any business component extraction is found to be excessive, you can reduce the extraction by adjusting the existing search specs specified in Siebel Tools (applets and business components), or Handheld Settings (for example, in DefaultBusObj), and selection filters (business object filters). If nothing else works, a business component filter can be used to force a reduction in the result set for a particular business component.

Setting Business Component Filters for Siebel Handheld Users

The Business Components view in the Application Administration screen contains the sync filter settings for business components. If you wish to add or remove business component filter settings for users, you do so in this view.

To add a business component filter setting

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Application Administration.
- 2 In the Application Administration screen, select the appropriate application, then click the Business Component view tab.
- 3 Click New, then enter the required information.

Some fields in the Business Component view are described in the following table:

Field	Comments
Owner	Read only. Contains the Siebel Handheld application to which the business component will be associated. For example, Siebel <Application name> for CE.
Business Component	A text box. Enter the business component name.
Name	A text box. Enter the business component filter name. For example, Filter 1.
Query	A text box. Enter the syntax for the query. For example, [Start Date] <=Today() For more information on developing queries, see "Data Filtering."

To remove a business component filter setting

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Application Administration.
- 2 In the Application Administration screen, select the appropriate application, then click the Business Component Filters view tab.
- 3 Select the filter setting record wish to remove.
- 4 From the Business Component Filters menu, choose Delete Record.

About Business Object Filters

The Siebel Web client supports named queries on most or all screens. These queries restrict the result set displayed to the user. Business object filters are the Handheld Sync equivalent to these named queries. Just like client based queries, they are applied to a specified business object. They also contain search or sort specifications for business components that are part of that business object.

The Default column is the only difference from the query syntax appearing in a PDQ filter for the Siebel Web client. The Default column is unique to the business object filter mechanism. For Web Client queries, users can set a default query for each view in their Preferences screen. If users do not do this, there is no default query, so all records are returned by default. This is not recommended for handheld deployments as this would result in excessive data extraction volumes. Thus, the Default column allows you to decide what filter should be used by default if a user does not make a selection. There is also a client option to revert to default filters selection. There should be at most a single default filter for each business object name. It is not recommended that you set more than one filter as the default for a particular business object. Note however, that the same default choice will be made by all clients.

Business object filters can be specified at either the Application level or the User level, but not at the Component level. Business object filters specified at the User level will override a filter specified at the application level provided the application-level filter has the identical values for the business object name and filter name. The list of filter choices presented to the user is the merged list of all application filters except those overridden at the user level, plus all user filters.

Setting Business Object Filters for Siebel Handheld Users

The Business Object Filters View in the Application Administration screen contains the sync filter settings for business objects. If you wish to add or remove business object filter settings for users, you do so in this view.

To add a business object filter setting

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile.
- 2 In the Application Administration screen, select the appropriate application, and then click the Business Object Filters view tab.
- 3 Click New, and then enter the required information.

- 4 The fields in the Business Object Filters view are described in the following table:

Field	Comments
Owner	Read only. Contains the Siebel Handheld application to which the business component will be associated. For example, Siebel <Application Name> for CE.
Default	Check to allow you to decide what filter will be used by default if a user does not make a selection.
Business Object	A text box. Enter the business object name. For example, Account.
Name	A text box. Enter the business object filter name. For example, BOFilter 1.
Query	A text box. Enter the syntax for the query. For example, 'Account'.Search = "[Account Status] = LookupValue (""ACCOUNT_STATUS"", ""Active"")" 'Account'.Sort = "Name, Location". For more information on developing queries, see "Data Filtering."

To remove a business object filter setting

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Application Administration.
- 2 In the Application Administration screen, select the appropriate application, and then click the Business Object Filters view tab.
- 3 Select the filter setting record wish to remove.
- 4 From the Business Object Filters menu, choose Delete Record.

About Thread Throttling

When a large number of users attempt to synchronize simultaneously, the load on a single server can become excessive. Thread throttling significantly reduces the total number of simultaneously active transaction processor threads and database extraction threads, thereby increasing the overall throughput for synchronization, without reducing the number of concurrent users. Synchronization performance degrades slightly but will successfully complete for all users.

Thread throttling allows the maximum possible number of concurrent users. It throttles in a manner that maximizes application server usage during any mixture of transaction processor and database extraction threads. Thus, if the server supports x concurrent transaction processing threads, it will allow this number of transaction processing threads while disallowing all database extraction threads. Similarly, if the server supports y concurrent database extraction threads, it will allow this number of database extraction threads while disallowing all transaction processing threads. If fewer than x transaction processing threads are currently active, some database extraction threads are allowed to execute concurrently. Similarly, if fewer than y database extraction threads are currently active, some transaction processing threads are allowed to execute concurrently.

For information on thread throttling settings, see [“Configuring Application Settings for Siebel Handheld” on page 53](#).

To enable thread throttling, see [“To add a new application setting” on page 57](#).

About Settings in the Handheld Administration Screens

Settings can appear at three levels: Application, Component, or User. Certain settings are only allowed at specific levels.

There are also two types of settings: single-line and multi-line settings. For a single-line setting, only one row may contain a unique setting name at a given level. Thus, a single-line setting at the User level may only be used once at that level. For single-line settings, the Sequence column should always contain a value of zero. For multi-line settings, the sequence column is necessary to allow multiple rows. The sequence column has no effect on actual processing, but is part of the logical key in the database table. When you create a new record in this database table, the record must have a unique logical key. For single-line settings, you may leave the sequence column value alone, which will result in a default value of zero being assigned. For multi-line settings, each line must include a different sequence number to avoid logical key conflicts. If the combination of setting name and sequence number is not unique for a particular parent record (Application, Component, or User), you will receive an error message when stepping off or saving the record. Multi-line entries must contain correct the key values before they can be saved to the database.

The rules for override are that any setting, whether single line or multi-line, specified at the lower levels overrides that same setting name at higher levels. Thus the settings at the application level apply unless specific settings are overridden for a particular component or a particular user. When an override occurs, it occurs for the complete setting name. Thus, if a particular multi-line setting has three rows at the user level and twelve rows at the application level, the resulting multi-line setting value for that setting will contain only the three rows at the user level. There is also an override mechanism to allow a setting to be removed, rather than replaced. To remove a setting from a higher level, specify the setting name to be removed, with an empty setting value.

Configuring Application Settings for Siebel Handheld

The Administration-Mobile screen contains a Settings list that allows you to change default settings. Some of the settings are described in [Table 10](#).

The Handheld setting value field has a limit of 2000 characters. To create a default business object (DefaultBusObj) setting value with more than 2000 characters, use the following general approach:

Break the value into multiple lines of DefaultBusObj settings. These settings should all be entered using the same DefaultBusObj value format:

- BusObj|Visibility|Query|BusComp_1|query specifications_1[|BusComp_n|query specifications_n]

When defining multiple lines of DefaultBusObj settings for a single business object, all view modes and filters should match. If a business component is found in multiple DefaultBusObj settings for a single business object, then the business component's query specifications will be concatenated with a space and appended into the previous business component's query specifications. You should be aware of this in order to decide if both query specifications should be combined with an OR or AND operative.

The DefaultBCUserProps and DefaultFields settings for a single business component can also be broken into multiple lines of settings if their values exceed 2000 characters. These settings should all be entered using the same value format as well:

- BusComp|BCUserProp_1[|BCUserProp_n] or BusComp|Field_1[|Field_n]

Table 10. Application Settings

Setting Name	Definition	Valid Values
AllowRememberPassword	Single-line setting. Specifies whether the Remember Password check box will be displayed on the Handheld Client Synchronization screen.	TRUE or FALSE
ApplicationDirectory	Single-line setting. Specifies the working directory (UNC path) of the Siebel Handheld synchronization component where user data are stored.	\\server name\directory name

Table 10. Application Settings

Setting Name	Definition	Valid Values
DBExtractThreadLoad	Single-line setting. Enables Thread Throttling functionality for database extract threads. It is the load (or weight) that will be assigned to each individual Database Extractor thread. For each running database extracting thread, this load value will be used to determine the total system load, which is then compared against the MaxTotalThreadLoads value. A new thread will only be started if the total system load does not exceed the MaxTotalThreadLoads value. A value of zero disables throttling of Database Extractor threads.	integer >= 0; default is 2
DefaultBCUserProps	Multi-line setting. Reduces the number of User Properties that are extracted to the device metadata, thus decreasing the number of fields for a business component that need to be extracted. These reductions lower the metadata extract size and optimize client performance by removing irrelevant user properties from the handheld configuration. If this directive is not specified for a business component, then all user properties will be extracted.	
DefaultBusObj	Multi-line setting. Used to force the extraction of a business object and its designated business components. This is typically used when a business component is not extracted because it is not specified via the "DefaultView" directive and is required for the application to function correctly. Another use of this directive is to designate business components that function as RBOs (reverse business objects).	Business Object Name Visibility Level Business Component Name QBE query construct For more on QBE (query by example) structure, see "Constructing Business Component and Business Object Filters" on page 88.

Table 10. Application Settings

Setting Name	Definition	Valid Values
DefaultFields	Multi-line setting. Used to force the extraction of fields for a particular business component. This is typically the case where the business component is extracted via the "DefaultView" directive but because the field is not visible on the applet, it is not extracted. Also when a hidden business component is extracted via the "DefaultBusObj" directive, it is necessary to specify all of the fields that need to be extracted for the business component. If no fields are specified via this directive, then the business component will not be extracted for this case.	Business Component Name Field1 Field2 ...
DefaultHandheldInsertMode	Single-line setting. Enables insert failure processing for synchronization. If enabled, synchronization will stop upon encountering a data conflict during an insert operation. End users or administrators must resolve the data conflict before synchronization can resume. This feature is disabled by default.	NoFail or FailOnError
DefaultHandheldSyncPickMode	Single-line setting. Enables Extended Pick processing for synchronization. If enabled, synchronization will stop upon encountering a data conflict during a pick operation. End users or administrators must resolve the data conflict before synchronization can resume. This feature is disabled by default.	NoFail or FailOnError
EnableBatchExtraction	Single-line setting. Enables or disables Batch Sync functionality.	TRUE or FALSE
EnableThrottleDebugMode	Single-line setting. This parameter enables or disables Thread Throttling functionality.	TRUE or FALSE
MaxThrottleWaitTime	Single-line setting. For Thread Throttling functionality. This is the upper limit on the amount of time (in minutes) any individual throttling request will be allowed to wait.	integer >= 0; default is 5

Table 10. Application Settings

Setting Name	Definition	Valid Values
MaxTotalThreadLoads	Single-line setting. For Thread Throttling functionality. It defines the maximum number of total thread loads (determined by DBExtractThreadLoad and TranProcThreadLoad for each type of thread) that will be allowed to run across the scope defined by ThreadThrottleScope. If a throttling request is made that causes this maximum to be exceeded, the requesting thread is delayed. The default value is zero, which completely disables the throttling mechanism.	integer >= 0; default is 0
NoDatabaseBusComp	Multi-line setting. Defines a business component that must be omitted from the device database and excluded from database extraction.	
NoExtractBusComp	Multi-line setting. Defines a business component that must be excluded from database extraction.	
SchemaChangeNotification	Multi-line setting. Defines a Business Service that should receive the Handheld Schema Change Notification.	(Siebel internal)
ThreadThrottleScope	Single-line setting. For Thread Throttling functionality. It defines the scope of the thread throttling mechanism as using one of two different modes: Process Thread (throttling occurs independently within each process), or Application (throttling occurs across all processes running the same handheld sync application on a single server). Only the first character of the ThreadThrottleScope parameter will be used to determine the value. All other characters are ignored. Thus "aardvark" is interpreted as "Application." Case is also ignored. The default value is "Application."	Application or Process

Table 10. Application Settings

Setting Name	Definition	Valid Values
TranProcThreadLoad	Single-line setting. For Thread Throttling functionality. It is the load (or weight) that is assigned to each individual Transaction Processor thread. For each running transaction processing thread, this load value is used to determine the total system load, which is then compared against the MaxTotalThreadLoads value. A new thread will only be started if the total system load does not exceed the MaxTotalThreadLoads value. A value of zero disables throttling of transaction processing threads.	integer ≥ 0 ; default is 3
TranProcThreshold	Single-line setting. For Thread Throttling functionality. This is the minimum time (in minutes) that the Transaction Processor will continue processing transactions before performing a handshake with the client. Once this value has been exceeded, a handshake occurs instead of starting to process the next transaction. Doing so prevents the client from timing out the session when thread throttling is enabled.	integer ≥ 0 ; default is 5
TranReapplyComponent	Single-line setting. Server component to use for playback of Companion Sync transactions for parent Companion Sync component.	
TranReapplyServer	Single-line setting. Siebel Application Server to use for playback of Companion Sync transactions for parent Companion Sync component.	

To add a new application setting

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Application Administration > Settings.
- 2 From the Settings list menu, select New Record.
- 3 Click in the name field and select the desired application setting.
- 4 Click in the Value field and enter the text of the setting.

Configuring Component Level Settings for Siebel Handheld

You administer server components for your handheld device from the Administration-Mobile > Server Component screen. The component displayed is based on the application selected in the Application Administration view. The Server Component Administration screen is used for overriding application settings at the component level on a specific server. The data entered here is used by the synchronization engine when the user synchronizes with the server.

NOTE: You can use this method for Direct Server Sync but not Companion Sync.

The Server Component screen contains a list of server components associated with the application that was selected in the Application Administration screen. For each server component, the Settings view details the associated settings.

The Name field value needs to be the exact component name, such as "SalesceObjMgr_enu", of the Handheld Sync server component.

Server component settings are used primarily for functionality required for individual server components. For example, thread throttling is dependent on components running on a particular server and is best set at the server component level. Examples of settings that might be made at the component level are MaxTotalThreadLoads, TranProcThreadLoad, DBExtractThreadLoad, and so on. Generally, settings made at the application level are shared by all server components.

Administering Barcode Settings for Siebel Handheld

Siebel Handheld can scan and parse data from HIBC and UCC/EAN barcodes. Siebel Administrators can set up Siebel Handheld to scan and parse any one-dimensional barcode and render the corresponding data in an applet. For example, if a control in a list applet is enabled for barcode scanning and the barcode scanned is valid, the handheld application will parse the barcode, create a new record, and fill in the field with parsed data. In form applets, after the user scans an item, the data representing the item automatically populates the barcode-enabled field. In order to do this, Siebel Administrators must define the barcodes and how data will be parsed from these barcodes in the Barcode Administration view.

Enabling Barcode Scanning in Siebel Handheld

Before using the barcode scanning feature, you must add the following parameter value in setup.ini:

```
Enabl eBarcode = Y
```

NOTE: In the event that your handheld application is not preconfigured to enable barcode scanning, you must make an Application Event Services entry in Siebel Tools.

To enable barcode scanning

- 1 Navigate to Application object, and then select Siebel ePharma CE.
- 2 Expand to Application Event Services object, add a new entry with the following:

Name: SHCE Core Barcode Service
 Event Name: HHCE_Start
 Business Service: SHCE Core Barcode Service

Mapping a Button for Socket In-Hand Scan Card

Siebel Handheld applications support embedded barcode scanners provided in Symbol and Intermec devices. In addition, Siebel Handheld applications support certain Socket scan cards. See *System Requirements and Supported Platforms* on Siebel SupportWeb for a list of supported handheld devices and Socket scan cards. Note that different Socket scan cards will require different scan card driver programs to be installed. Check with the card vendors/websites for required driver program installation.

For Intermec and Symbol devices, the barcode scanning can be triggered by the built-in buttons. If you are using Socket scan cards, the following steps are required to be taken on the Handheld device for mapping a button to the barcode-triggering utility software, SocketTrigger.exe.

To map a button to SocketTrigger.exe (Socket Scan Card only)

- 1 Navigate to Start > Settings > Personal > Buttons.
- 2 From the Button list, select a button to trigger In-Hand Scan Card.
- 3 In the Button Assignment field, select SocketTrigger, and then tap OK.

Creating New Barcode Definitions for the Handheld Application

You can define new one-dimensional barcodes in the Barcode Administration views. To define a new barcode, you need to create a new barcode definition in the Barcodes list, then create corresponding records in the Barcode Item list to define data elements within the barcode.

To create a new barcode definition

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Barcode Administration.

- 2 Click New, then fill in the fields.

The fields in the Barcodes list are described in the following table:

Field	Comments
Name	Required. Any descriptive name for the barcode. Must be unique for all records defined in the Barcode screen.
Sequence	Required. This is the sequence for barcode parsing. The lower of two sequence numbers takes precedence when deciding which barcode in the list to match. For example, if a scanned barcode matches two entries in the barcode list, the one with a lower sequence number will be picked for the match. The lowest sequence number is 1.
Barcode Type	Required. Type of barcode standard. Can either be Location or Code. For a Location type barcode, the barcode data element parsing is done solely by the Sequence field in Barcode Item list. For a Code type barcode, the barcode data is first parsed into multiple sections by the Code field in the Barcode Item list, then is further parsed by the Sequence field for each section. See "Example of Location Type Barcode" on page 62 and "Example of Code Type Barcode" on page 63 .
Buscomp	Optional. Used to designate into which business component the target data is placed.
Min Length	Optional. The minimum length for the barcode data in digits. If it is not set, the default minimum length is 1.
Max Length	Optional. The maximum length for the barcode data in digits. If it is not set, the default maximum length is 10000.
Prefix	Optional. Defines the value that the parsing algorithm uses to identify barcode definition to use. The allowed format for Prefix is any ASCII character for exact match, '#' for any single digit number match (that is, 0 - 9), '&' for any alphabet character in lower and upper case, or '*' for a wild card match. For example, you can enter ##9&* as the prefix, which means the first two characters can be any number, the third character has to be '9', the fourth character can be any alphabet character, and the fifth character can be any ASCII character.
Suffix	Optional. Allows you to associate suffixes with individual fields. The allowed format for Suffix is the same as the one specified for Prefix. In addition, the rules for matching Suffix are the same as the ones for Prefix.
Description	Optional. Detailed description for this barcode.

- 3 In the Barcode Item list, add new records to identify how data will be parsed from barcode. Depending on the type of barcode standard you just defined (either Location or Code), you then need to create new records in the Barcode Item list to identify how data is parsed.
- 4 In the Barcode Item list, Click New, then update the required fields.

Some of the fields are described in the following table:

Field	Comments
Name	Required. Name of the barcode item (for example, Product Name corresponds to the Product Name field). This name does not determine which field in BusComp the parsed data is written to. That field is determined by the "Data Desc" field.
Code	Applicable for Code barcodes only. Used to break a barcode into multiple barcode sections.
Sequence	Required. The sequence for barcode data elements parsing. For Location barcodes, this corresponds to the sequence used to parse data elements from the barcodes. For Code barcodes, this corresponds to the sequence used to parse data elements within barcode sections.
Min Length	Required. Minimum Length of the character string for this data element. If this is a variable length string, then Minimum Length is not equal to Maximum Length.
Max Length	Required. Maximum Length of the character string for this data element. If this is a variable length string, then Minimum Length is not equal to Maximum Length.
Data Desc	Optional. Used by algorithm to identify what field to parse this data into. For example, Product Name corresponds to the Product Name field.
Data Format	Optional. Defines format for data element (for example, MMDDYY is for date).
Action	Optional. Defines the action for the data element. Both Data Format and Action are written to the field specified in "Data Desc" by the following format: "<parsed data element>,<Data Format>,<Action>". See the example in Table 14 .

Example of Location Type Barcode

The two entries for the Barcode list, HIBC Secondary and IBM, are shown in [Table 11](#).

Table 11. Location Type Barcode List Entries

Name	Sequence	Barcode Type	Buscomp	Min Length	Max Length	Prefix	Suffix	Description
HIBC Secondary	1	Location	Medical Product		31	+\$9### ###3		
IBM	2	Location	Tech Product		30	+\$9### ###39		

Entries for Barcode - HIBC Secondary in the Barcode Item list are shown in [Table 12](#).

Table 12. Location Type Barcode Item List Entries

Name	Code	Sequence	Min Length	Max Length	Data Desc	Data Format	Action
Prefix		1	4	4	Prefix		
Quantity		2	5	5	Quantity		
Exp date flag		3	1	1	Exp flag		
Date		4	6	6	Expiration Date	YYMMDD	
Lot		5	0	13	Lot #		
Link		6	1	1	Link		
Check		7	1	1	Check		

If the barcode being scanned is +\$90010039509283C001LZ, both barcode entries "HIBC Secondary" and "IBM" are good matches. Since HIBC Secondary has a lower sequence as 1, it is picked as the final match for parsing the barcode. The data is parsed as follows:

{(Prefix, "+\$9") (Quantity, "00100") (Exp flag, "3") (Expiration Date, "950928,YYMMDD") (Lot #, "3C001") (Link, "L") (Check, "Z")}

NOTE: In this example, the use of "Prefix" in the two tables is different. The Prefix column in the Barcode list table is required for matching the record in the Barcode list. The Prefix row in the Barcode Item list table is a user-defined data element to be parsed for a particular barcode.

Example of Code Type Barcode

Entries for Code type barcode in the Barcode list are shown in [Table 13](#).

Table 13. Code Type Barcode List Entries

Name	Sequence	Barcode Type	Buscomp	Min Length	Max Length	Prefix	Suffix	Description
UCC/EAN	1	Code	Medical Product		37	01		

Entries for Code type barcode in the Barcode Item list are shown in [Table 14](#).

Table 14. Code Type Barcode Item List Entries

Name	Code	Sequence	Min Length	Max Length	Data Desc	Data Format	Action
AI 01	01	1	2	2	AI 01		
Packaging Indicator	01	2	1	1	Indicator		
UCC/EAN #	01	3	12	12	UCC/EAN		
Link	01	4	1	1	Link		
Quantity Section	30	1	3	5	Quantity Section	1000	Validate
AI 240	240	1	3	3			
Product #	240	2	1	13	Product #		

The barcode UCC/EAN is parsed to three sections, 01, 30, and 240. If the barcode being scanned is **01103123456789033050240**ABCDEFG, the data is parsed as follows:

Parsed Data = {(AI 01, "01") (Indicator, "1") (UCC/EAN, "031234567890") (Link, "3") (Quantity section, "3050,1000,Validate") (Product #, "ABCDEFG")}

NOTE: The Code portions in the barcode appear in bold text.

Enabling Applications Views for Barcode Scanning

You can enable any existing or new view for barcode scanning.

To enable an application view for barcode scanning

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Barcode Enabling.
- 2 Click New, then enter the necessary information.

The fields in the Barcodes list are described in the following table:

Field	Comments
View	The view in the handheld application from which the scan occurs.
Applet	The applet within the view from which the scan occurs.
Buscomp	The business component from which information is drawn.
Buscomp Field	The specific field within the business component that should be updated through barcode scanning.

Example: Process of Creating a New Barcode Definition in the Service Handheld Application

Although this example is for the Siebel Service Handheld device, it pertains to all Siebel Handheld products. You can define new one-dimensional barcodes in the Barcode Administration views. To define a new barcode, you need to create a new barcode definition in the Barcode list, then create corresponding records in the Barcode Item list to define data elements within the barcode.

To create a new barcode definition, complete the following procedures:

- [“To create a new barcode definition for Siebel Service Handheld” on page 64](#)
- [“To enable the SHCE Service FS Activity Parts Movements views for barcode scanning” on page 65](#)

To create a new barcode definition for Siebel Service Handheld

- 1 From the application level menu, select Navigate > Site Map > Administration-Mobile > Barcode Administration.
- 2 Click New, then fill in the necessary fields.

The following table describes the fields in the Barcodes list.

Field	Sample Data
Name	Hard Disk 100 GB
Sequence	Set to the greatest number in the current list view plus one
Barcode Type	Location
Buscomp	FS Activity Parts Movement

Field	Sample Data
Min Length	12
Max Length	12
Prefix	#
Description	Service

- In the Barcode Item list, add a new record to identify how data will be parsed from the barcode. The following table describes the fields in the Barcode Item list.

Name	Sequence	Min Length	Max Length	Data Desc
UPC Code	1	1	1	
MFG Code	2	5	5	
Product Name	3	5	5	Product Name
CC	4	1	1	

NOTE: Reducing the amount of barcode seed data extracted to the Service Handheld application improves client performance and reduces synchronization database extract size. The following steps provide an example of extracting only the barcode standards that are required for the Service Handheld application. This is applicable as long as all the barcode records for the Service Handheld application defined in the Barcode list have the Description attribute set to "Service."

- From the application level menu, select Navigate > Site Map > Administration-Mobile > Application Administration.
- In the Application Administration view, select "Siebel Service for CE."
- Click the Settings view tab, and make sure the parent record is the application "Siebel Service for CE."
- Locate the "DefaultBusObj" directive that has the following value:
 - "SHCE Barcode|0||SHCE Barcode||SHCE Barcode Item||SHCE Barcode Enable|".
 Replace that value with the following value:
 - "SHCE Barcode|0||SHCE Barcode|[Description]="Service"|SHCE Barcode Item||SHCE Barcode Enable|".

To enable the SHCE Service FS Activity Parts Movements views for barcode scanning

- From the application-level menu, select Navigate > Site Map > Administration - Mobile > Barcode Enabling.
The Barcode Enable list appears.

- 2 If the following record does not exist, create a new record to enable the Product Name field in the SHCE Service FS Activity Part Movements List Applet for barcode scanning with the following information:

View	Applet	Buscomp	Buscomp Field
SHCE Service FS Activity Part Movements	SHCE Service FS Activity Part Movements List Applet	FS Activity Parts Movement	Product Name

- 3 If the following record does not exist, create a new record for the Product Name field in the SHCE Service FS Activity Part Movements Form Applet for barcode scanning with the following information:

View	Applet	Buscomp	Buscomp Field
SHCE Service FS Activity Part Movements (More Info)	SHCE Service FS Activity Part Movements Form Applet	FS Activity Parts Movement	Product Name

- 4 Save the changes. Now the Buscomp Field "Product Name" in both the "SHCE Service FS Activity Part Movements" view and the "SHCE Service FS Activity Part Movements (More Info)" view have been enabled for barcode scanning. The Buscomp Field "Product Name" specified here matches the value in the Data Desc column in the Barcode Item list defined earlier.

NOTE: The example provided above assumes that the product Hard Disk 100GB has been defined and properly set in the appropriate product catalog.

About Monitoring Synchronization Sessions for Siebel Handheld

You monitor Siebel Handheld application synchronization sessions and synchronization conflicts from a number of screens within the Siebel Mobile Web Client, or if you are using DSS or DSSvP you do so by way of the Siebel Web Client. Every time a user synchronizes with the server, a record is made.

The following topics relate to synchronization monitoring.

- ["Monitoring Synchronization Sessions for Siebel Handheld" on page 67](#)
- ["Obtaining Error Details from Siebel Handheld Synchronization Sessions" on page 67](#)
- ["Obtaining Business Component Information from Siebel Handheld Synchronization Conflicts" on page 68](#)

- [“Obtaining an Audit Trail for Siebel Handheld Synchronization Sessions” on page 68](#)
- [“Acting Upon Synchronization Errors in Siebel Handheld” on page 69](#)

Monitoring Synchronization Sessions for Siebel Handheld

The Session Administration view allows you to gather all data related to each sync session a user performs. The Sync Status list appears above two child lists: Sync Sessions and Extraction Info. These lists allow you to do the following:

- **Sync Status:** Allows you to monitor each user sync session, and includes such data as: sync status, the date, type of sync and so on.
- **Sync Sessions:** Allows you to gather further information on the status of each sync session, including conflicts during the sync, the size of the data extracted, and so on.
- **Extraction Info:** Allows you a detailed look at all data extracted during the sync session, including business component information, the number of records extracted. You use this list to help get answers to questions such as the following:
 - Why did a particular record download to the device?
 - Why is an expected server record not downloaded to the device?
 - Why is the total number of records showing up in some view so big?
 - Why is the total number of records showing up in some view so small?
 - Why does the extraction take so long?

There is one extraction record for each unique extraction context. The extraction record will list the filters used to control the extraction, the context of the extraction, how many records exist in that context for those filters, and how long it took to extract that set of records. By analyzing these records, and looking at all extraction changes resulting from filter changes, and, or changes to search specs (defined in Siebel Tools), you can answer all of the above questions.

To monitor synchronization sessions

- From the application-level menu, select **Navigate > Site Map > Administration-Mobile > Session Administration**.

The Sync Status list appears, with the two child lists, Sync Sessions and Extraction Info, below it.

Obtaining Error Details from Siebel Handheld Synchronization Sessions

The Conflict Administration view allows you to obtain details of sync errors that occur during individual sync sessions.

To obtain synchronization error details

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Conflict Administration.
- 2 In the Transactions list, select the appropriate record, and then click the Error Details view tab.
- 3 In the Error Details list, select or query for the desired record.

Obtaining Business Component Information from Siebel Handheld Synchronization Conflicts

The Transactions view on the Conflict Administration screen allows you to obtain business component information related to synchronization errors that occur during individual sync sessions.

To obtain business component error details

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Conflict Administration.

The Transactions view appears.

- 2 In the Transactions view, select the appropriate record, and then click the Business Components view tab.

Obtaining an Audit Trail for Siebel Handheld Synchronization Sessions

The Transactions view on the Conflict Administration screen allows you to obtain audit trail information for an action that was taken against a particular transaction.

NOTE: You must enable Audit Trail separately. For information on enabling Audit Trail, see *Applications Administration Guide*.

To obtain audit trail information for synchronization error details

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Conflict Administration.

The Transactions view appears.

- 2 In the Transactions view, select the appropriate record, and then click the Audit view tab.

Acting Upon Synchronization Errors in Siebel Handheld

Upon reviewing a synchronization error, you can act upon it by performing one of three different actions.

To act upon handheld sync transaction errors

- 1 From the application-level menu, select Navigate > Site Map > Administration-Mobile > Conflict Administration.

The Transactions list appears. The transaction buttons are described in the following table:

Action	Result
Reapply	<p>Reapplies the selected transaction with values listed in the view (or Field Value view). These values override the results provided by the server.</p> <p>TranReapplyComponent and TranReapplyServer are necessary when using Companion Sync and ignored for Direct Server Sync. These are used when selecting transactions to reapply from the Administration - Conflict screen.</p> <p>If TranReapplyComponent and TranReapplyServer are not specified, it is impossible to reapply transactions originating from Companion Sync.</p>
Export	Exports the content of the transaction in the same format used by the sync engine. This output file can be sent to Siebel Technical Support for problem analysis.
Ignore	Accepts the current status and does not act upon the error. The record becomes read-only. There is no impact, except that the error will no longer appear in queries for unresolved conflicts.

- 2 Click either Reapply, Export, or Ignore depending on your needs.

Process for Administering Siebel Pharma Handheld

Siebel administrators should see *Siebel Life Sciences Guide* for detailed information about managing samples. The following sections cover only those administration procedures that apply to the handheld version of Pharma.

The following sections cover the designated topics and procedures:

- [“Managing Samples Records in Pharma Handheld” on page 70](#)
- [“Administering Disclaimer Text in Siebel Pharma Handheld” on page 71](#)
- [“Configuring Distributor Names in Siebel Pharma Handheld” on page 71](#)
- [“Performing a Signature Audit in Siebel Pharma Handheld” on page 72](#)
- [“Verifying Signature Capture in Siebel Pharma Handheld” on page 73](#)
- [“Configuring User Properties for Closing Inventory Periods in Siebel Pharma Handheld” on page 75](#)
- [“Configuring User Properties for Signature Capture Verification in Siebel Pharma Handheld” on page 76](#)
- [“Validation Logic of the Sign and Submit Buttons in Siebel Pharma Handheld” on page 77](#)
- [“Validating the DEA Number in Siebel Pharma Handheld” on page 84](#)
- [“Preparing Receipts for Calls in Siebel Pharma Handheld” on page 85](#)

Managing Samples Records in Pharma Handheld

Administrators can manage samples inventory using either Siebel Pharma Handheld or Siebel Life Sciences, but should not use both. In order to keep samples inventories in sync, end users should be prevented from submitting a samples transaction on the server when the same record is still editable on their handheld device.

When a user submits a record, the status changes to Submitted and it becomes read-only, meaning no additional operations are allowed on the record. By updating a user property and writing two small Visual Basic scripts, you can specify that synchronized records are also read-only.

- First, the administrator changes the value of the user property “Update Status To Synchronized” to Y.

Making this change invokes the UpdateStatusToSynchronized method on the Sample Txn business component.

- Then, the administrator writes a small Visual Basic script for this method to change the status on the Sample Txn to “Synchronized.”
- Finally, the administrator writes another Visual Basic script to specify that the record becomes read-only when its status changes to “Synchronized.”

This prevents users from accidentally submitting the sample transactions on the server while the same record is still editable on their handheld device.

NOTE: Sample transactions are not logged upon submitting a sample drop. They only appear on the handheld device after syncing.

Administering Disclaimer Text in Siebel Pharma Handheld

Your legal department may require that a change be made to the disclaimer text that appears below the signature area on the Siebel Signature Capture display of Siebel Pharma Handheld. Only one disclaimer can be active at a time.

NOTE: Signature capture configurability is only available on handheld applications, not on Siebel Web client applications.

To edit the disclaimer text

- 1 From the application–level menu, select View > Site Map > Samples Administration > Disclaimer Administration.

The Disclaimer Administration view appears.

- 2 In the Disclaimers list, add a record.

- 3 Enter the new text in the Disclaimer field.

The Status, Start Date, End Date, Created By, and Created fields are read-only.

- 4 Click Submit.

The submitted disclaimer becomes active, and the status and date fields are updated. When sales representatives next synchronize, the disclaimer on their Pharma handheld device is updated.

Configuring Distributor Names in Siebel Pharma Handheld

The name of the distribution company appears by default on the Siebel Signature Capture display. You may need to change this name if, for example, there is a name change as a result of a merger between two companies.

In addition, a company may use a contract sales force to distribute some of its products. You can use the Distributor by Employee feature to customize the display to show the name of the contract distributor for the contract sales representatives and to show the name of the primary pharmaceutical company for its sales representatives.

To change the distributor name in the Siebel Signature Capture display

- 1 From the application–level menu, choose Navigate > Site Map > Application Administration > System Preferences.

The System Preferences Administration view appears.

- 2 Find the Company Name system preference and change the value to the new company name.

When the sales reps next synchronize their PDAs, the new company name is downloaded to their Siebel Pharma Handheld applications.

- 3 From the application–level menu, select Navigate > Site Map > User Administration > Employees.

The Employees Administration view appears.

- 4 Select the employee from the Employees list.
- 5 In the More Info view, enter the account of the distributor in the External Account field. (The external account must already have been set up as an account.)

If the External Account field is blank for an employee, the company name set in the System Preference Administration view, set in [Step 2](#), is used.

- 6 Repeat [Step 4](#) and [Step 5](#) for each employee of the distributor.

Performing a Signature Audit in Siebel Pharma Handheld

The Siebel administrator is typically assigned responsibility for checking the validity of signatures recorded electronically. This is done using the Verify button in the Signature Audit Administration view. For more information about the logic behind the Verify button, see [“Validation Logic of the Sign and Submit Buttons in Siebel Pharma Handheld” on page 77](#).

As the samples administrator, you should check Signature Audit Administration regularly and perform signature capture verification to make sure that signatures collected from each contact are consistent.

Users may see an error message if Signature Audit Administration tasks are performed on a desktop computer running multiple versions of Siebel Pharma. Make sure that only the latest version of Siebel Pharma is running, and uninstall all previous versions.

To verify signatures

- 1 From the application–level menu, select Navigate > Site Map > Samples Administration > Signature Audit Administration.
- 2 In the Sample Signatures list, create a query.
- 3 Visually compare the signatures for consistency.

Contact names are retained even if the Contact record is deleted. If a Contact record is deleted from Navigate > Site Map > User Administration > Persons, the contact name is removed from all applets with reference to that contact’s name in the S_CONTACT table. Therefore, if the Contact Id is deleted from the S_ACT_SIGN table, the last name and first name fields appear empty in the Sample Signature form in the Signature Audit Administration view.

However, the Contact Full name is not affected by deleting a contact record because it is stored in a text field in the same table. In the Signatures applet, the control above the signature displays the full name of the contact at the time of the call (that is, no reference to the S_CONTACT table). Because the contact’s name is not removed from this applet, a permanent and complete electronic record of calls captured with signatures recorded electronically is maintained.

Verifying Signature Capture in Siebel Pharma Handheld

Signature capture verification compares information captured at the time of signature (the signature event string) with the current call information (the current call string) to assess if the call information has been modified. Reasons the call information might be modified include:

- Re-creation of a sample receipt
- Sample adjustments
- Fraud

Signature capture verification is launched from the Verify button on the Signature Audit Administration view. For an example of signature audit administration, see [“Performing a Signature Audit in Siebel Pharma Handheld” on page 72](#).

The Signature Key

When the signature is first created, a signature key is calculated from the signature and stored. When the signature is verified, this key is recalculated from the current signature and compared to the stored key. If the two keys do not match, the signature key checksum fails. A failed checksum indicates that the current signature has been altered since the time of capture. If the checksum fails, the signature is not displayed in the Signature Audit Administration view.

Outcomes of Checksums

The signature capture verification status (Passed, Adjusted, or Failed) is determined by the outcome of checksums: user property checksums, which compare text saved at the time of the signature capture with fields in the current call record and the signature key checksum. See [Table 15 on page 73](#) for examples of checksum combinations.

NOTE: You may need to expose the Verification Status field using Siebel Tools. This is a configuration change that may need to be performed before implementation of Siebel Pharma Handheld. For more information, see the release notes documentation for Siebel Pharma Handheld.

Each user property checksum returns results for a different group of fields involved in the signature capture. Checksum examples and verification status settings are shown in [Table 15](#).

Table 15. Checksum Examples

If...	Then the verification status is set to...
All checksums pass	Passed
Any of the checksums fail	Failed
One or two checksums return Adjusted and the others pass	Adjusted

User Properties for Signature Capture Verification

In the default installation of Pharma Handheld, there are three user properties that set fields for the checksums (Checksum Field: 1, Checksum Field: 2, and Checksum Field: 3). These user properties and their default configurations are described in the following sections.

Using Siebel Tools, you can create additional checksums. For more information, see [“Creating New Checksum Field User Properties”](#) on page 77.

Checksum Field: 1—Signature Header Text

This checksum compares the signature header text recorded at time of signature with the similar string in the current call record. The three possible outcomes (Passed, Adjusted, and Failed) for this checksum depend upon the signature header text strings and the (signature) Status field, as shown in [Table 16](#).

Table 16. Checksum Status for Signature Header Text

The Checksum Status Is...	If the Signature Event String...
Passed	Equals the current call string.
Adjusted	Is different from the current call string and the (signature) Status is Inactive.
Failed	Is different from the current call string and the (signature) Status is Active.

Checksum Field: 2—Signature Body Text

This checksum compares the signature body text recorded at the time of signature with the similar string in the current call information.

The outcome (Passed and Adjusted) for this checksum depends on whether the signature body text strings match, as shown in [Table 17](#).

Table 17. Checksum Status for Signature Body Text

The Checksum Status Is...	If the Signature Event String...
Passed	Equals the current call string.
Adjusted	Is different from the current call string.

Checksum Field: 3—Sales Representative’s Row Number

This checksum compares the identity of the call creator at time of signature with the identity of the current creator of the call. The employee’s row number is used to identify the call creator.

An employee’s row number can be obtained by selecting the employee in the Employees view (Navigate > Site Map > User Administration > Employees) and then selecting Help > About Record. The Employee’s Row # appears in the About Record dialog box.

The outcome (Passed and Failed) for this checksum depends on whether the sales representative name text strings match, as shown in [Table 18](#).

Table 18. Checksum Status for Sales Representative's Row

The Checksum Status Is...	If the Signature Event String...
Passed	Equals the current call string.
Failed	Is different from the current call string.

Configuring User Properties for Closing Inventory Periods in Siebel Pharma Handheld

The recommended process for closing an inventory period is:

- 1 Synchronize the handheld device with Siebel server immediately before closing the period.
- 2 Close the inventory period.
- 3 Synchronize the handheld device with Siebel server a second time, immediately after closing the inventory period.

End users must synchronize the handheld with Siebel server before closing the inventory period because there may be calls on the handheld that have not yet been synchronized with Siebel server. Only the current active period is downloaded to the handheld device. Therefore, after the current inventory period is closed, they must synchronize a second time in order to bring down the next active period.

To enforce this procedure, the inventory period closure logic has been added. When it is enabled, this logic goes into effect during the inventory period reconciliation. It ensures that the end user synchronizes his handheld with Siebel server before closing the inventory period, and it requires the end user to submit all outstanding calls (that is, when an electronic signature has been captured, but the call has not been submitted).

The following user properties have been created on the Pharma Inventory Period business component to support the inventory period closure logic:

- **Inventory Closure Validation.** The default value is N (No), and the Inventory Period Closure logic is not triggered. To activate the Inventory Period Closure logic, set this parameter to Y (Yes). Setting the parameter to Y forces the end user to synchronize the handheld with Siebel server prior to closing the inventory period.

- **Acceptable Period to Complete Synchronization.** The default value is 30 (minutes). When Inventory Closure Validation is set to Y, the Acceptable Period to Complete Synchronization user property determines a grace period during which the end user must synchronize the handheld before closing the inventory period. If the end user does not synchronize within the time period, he will not be permitted to close the inventory period.

If Inventory Closure Validation is enabled and the Acceptable Period to Complete Synchronization user property is not created, the default value of 30 minutes is used.

After the end user successfully closes the inventory period, he sees a message that prompts him to synchronize the handheld device with Siebel server. Note, however, this step is not enforced. However, if the end user fails to synchronize a second time, the handheld device will not receive the current period, and this can potentially cause synchronization errors the next time the end user synchronizes.

NOTE: The same logic is enforced during inventory reconciliation.

Configuring User Properties for Signature Capture Verification in Siebel Pharma Handheld

Use Siebel Tools to edit the following user properties:

- Turn checksums on or off
- Add additional fields to checksums
- Remove fields from checksums
- Create new checksums of the same form as Checksum Field: 3

Editing Checksum Field: 1—Signature Header Text

This checksum compares the Signature Header Text field in the Pharma Call Signature business component with the concatenated text string of the Header Text Fields (Header Text Field: 1 to Header Text Field: 7) in the Pharma Professional Call business component.

In Siebel Tools, you can edit these user properties by adding, deleting, or editing the Header Text Fields in the Pharma Professional Call business component. The maximum allowed number of Header Text Fields is 20 (Header Text Field: 20).

Editing Checksum Field: 2—Signature Body Text

This checksum compares the signature body text in the Pharma Call Signature business component with the concatenated text string of the Signature Body Text Fields (Signature Body Text Field: 1 to Signature Body Text Field: 3) in the Pharma Call Sample Dropped business component.

In Siebel Tools, you can edit these user properties by adding, deleting, or editing the Signature Body Text Fields in the Pharma Call Sample Dropped Call business component. The maximum allowed number of Signature Body Text Fields is 10 (Signature Body Text Field: 10).

Editing Checksum Field: 3—Sales Representative’s Row Number

This checksum compares the “Created by” field of the Pharma Call Signature business component with the “Created by” field of the Pharma Professional Call business component.

In Siebel Tools, you can edit these user properties by replacing “Created by” with any field found in both business components.

Creating New Checksum Field User Properties

In Siebel Tools, you can create user properties for up to 25 checksums that compare fields in the Pharma Call Signature business component with fields in the Pharma Professional Call business component.

Use Checksum Field: 3 as a template to create new user properties with the same format.

Name the new user property Checksum Field: *n*, where *n* is less than or equal to 25. See [Table 19](#).

Table 19. Checksum Field User Properties

User Property Name	Value
Checksum Field: 3	“Created by”, “Created by”
Checksum Field: <i>n</i>	“ <i>field in Pharma Call Signature</i> ”, “ <i>field in Pharma Professional Call</i> ”

Validation Logic of the Sign and Submit Buttons in Siebel Pharma Handheld

You can edit the validation logic for the Signature and Submit buttons for professional and account calls.

Default Validation Logic Flowcharts

The default validation logic for the Signature and Submit buttons is shown in the following flowcharts:

- Signature button, [Figure 1 on page 78](#)
- Professional Call Submit button, [Figure 2 on page 79](#)
- Account Call Submit button, [Figure 3 on page 80](#)

Not all implementations of Pharma Handheld require the extensive validation as shown in the following flowcharts. Before most validation steps, the procedure consults a user property to determine if the field should be used during the validation. For example, if it is not necessary to validate the License Number field, the user property Validate License Number is set to false. The Signature button validation then skips the validation question “Is the License Number field populated?”.

User Properties that can be used to alter validation logic are described in [“Changing Validation Logic by Editing User Properties”](#) on page 80.

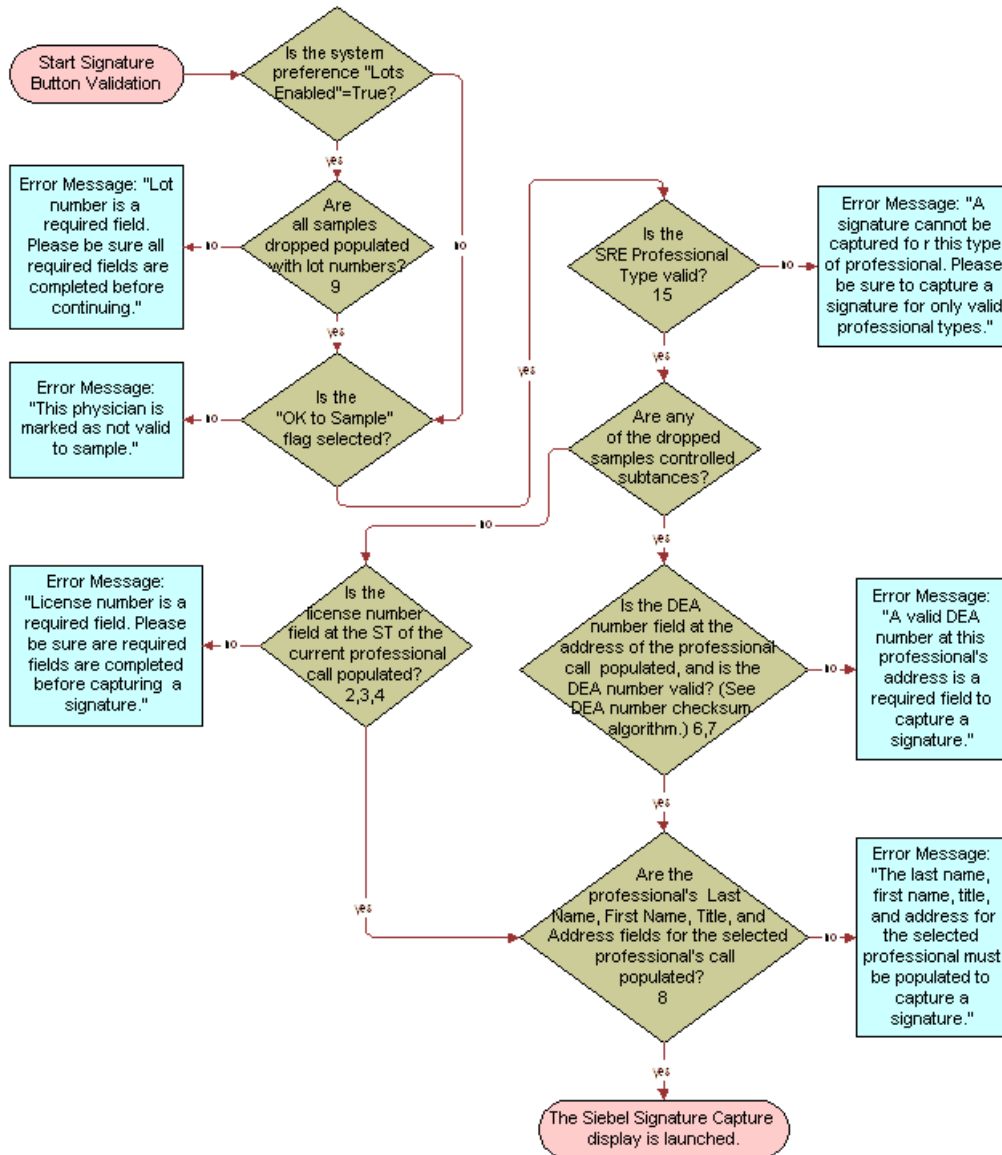


Figure 1. Default Validation Logic Flowchart for Signature Button

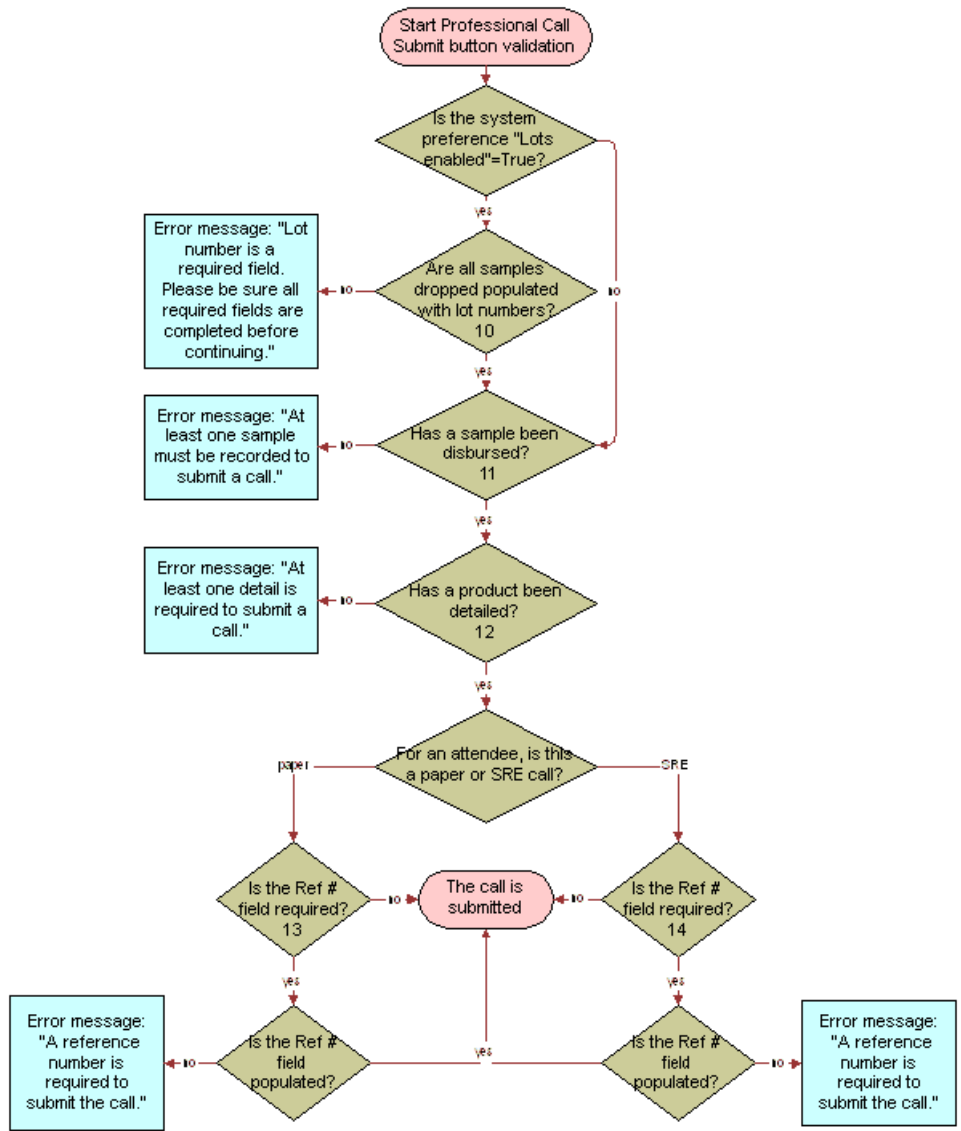


Figure 2. Default Validation Logic Flowchart for Professional Call Submit Button

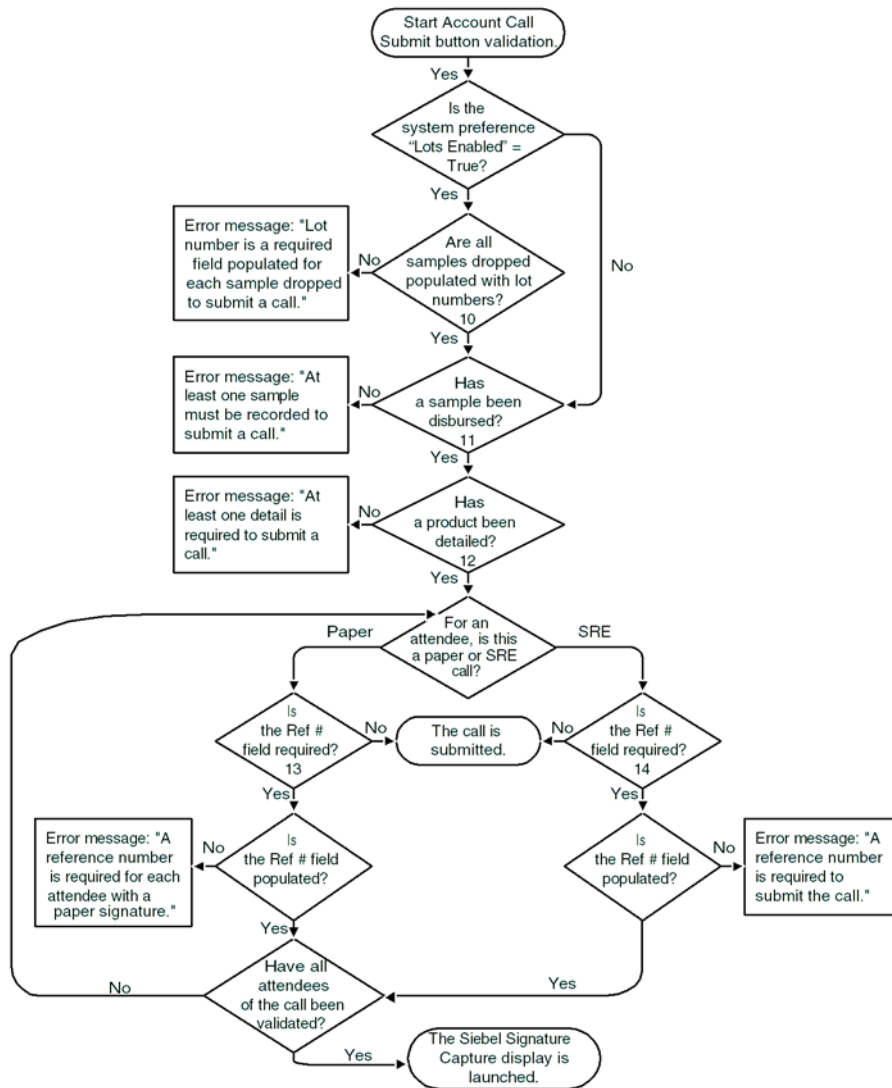


Figure 3. Default Validation Logic Flowchart for Account Call Submit Button

NOTE: The numbers in the flowchart correspond to the numbers of the user properties show in Table 20 on page 81

Changing Validation Logic by Editing User Properties

Validation logic uses user properties to determine whether a field should be used during validation.

Table 20 explains the user properties you can use to alter the validation logic of the Sign, Professional Call Submit, and Account Call Submit buttons.

Table 20. User Properties for Setting Sign and Submit Button Logic

Flowchart Reference	User Property	Action if Y...	Action if N...	Default Value
1	<p>"Validate OK to Sample"</p> <p>Use to enforce confirmation that the OK to Sample flag is selected before launching the Signature Capture display.</p>	Enforce the OK to Sample validation.	Skip the OK to Sample validation.	Y
2	<p>"Validate License Number"</p> <p>Use to enforce validation that the License # is populated before launching the Signature Capture display.</p>	Enforce the License Number validation.	Skip the License Number validation.	Y
3	<p>"Validate License Number Status"</p> <p>Use to enforce validation that the License # status = Active before launching the Signature Capture display.</p>	Enforce the License Number Status validation.	Skip the License Number Status validation.	N
4	<p>"Validate License Number Expiration"</p> <p>Use to enforce validation that the Expiration date on the License # is later than Today before launching the Signature Capture display.</p>	Enforce the License Number Expiration validation.	Skip the License Number Expiration validation.	N

Table 20. User Properties for Setting Sign and Submit Button Logic

Flowchart Reference	User Property	Action if Y...	Action if N...	Default Value
N/A	<p>"Validate Address DEA Number"</p> <p>Use to enforce that the DEA number is valid (DEA # checksum algorithm) at the time the value is entered into the DEA # field on the Address child applet (on the handheld).</p> <p>This user property applies to both the laptop and the Siebel Handheld applications.</p>	Enforce the Address DEA Number validation (field is populated <i>and</i> number is valid).	Skip the Address DEA Number validation (field is populated <i>and</i> number is valid).	Y
6	<p>"Validate Signature DEA Number"</p> <p>Use to enforce that the DEA number is populated and that the value is valid (DEA # checksum algorithm) before launching the Signature Capture display.</p>	Enforce the DEA Number validation in the Signature button (field is populated <i>and</i> number is valid).	Skip the DEA Number validation in the Signature button (DEA number is valid per the checksum routing <i>and</i> the field is populated).	Y
7	<p>"Validate DEA Number Expiration"</p> <p>Use to enforce validation that the Expiration date on the DEA is later than Today before launching the Signature Capture display.</p>	Enforce the DEA Number Expiration validation in the Signature button (expiration date is later than today).	Skip the DEA Number Expiration validation in the Signature button (expiration date is later than today).	N
8	<p>"Validate Professional Profile"</p> <p>Use to validate if the professional's Last Name, First Name, Title, and Address fields are populated before launching the Signature Capture display.</p>	Enforce the Professional Profile validation.	Skip the Professional Profile validation.	Y

Table 20. User Properties for Setting Sign and Submit Button Logic

Flowchart Reference	User Property	Action if Y...	Action if N...	Default Value
9	<p>"Validate Sign Lot Number"</p> <p>Use to validate if the lot number is populated on launching the Signature Capture display.</p>	Enforce the Signature button Lot Number validation.	Skip the Signature button Lot Number validation.	N
10	<p>"Validate Submit Lot Number"</p> <p>Use to validate if the lot number is populated on submitting a call.</p>	Enforce the Submit button Lot Number validation.	Skip the Submit button Lot Number validation.	Y
11	<p>"Sample Disbursed Required"</p> <p>Use to require that at least one sample be disbursed before submitting the call.</p>	Enforce that at least one sample be disbursed.	Do not require at least one sample disbursed.	N
12	<p>"Must Detail Products"</p> <p>Use to require that at least one product be detailed before submitting the call.</p>	Enforce that at least one product be detailed.	Do not require at least one product detailed.	N
13	<p>"Paper Reference Number Required"</p> <p>Use to require a sample reference number for calls with paper signatures.</p>	Enforce the Paper Reference Number required validation.	Skip the Paper Reference Number required validation.	Y
14	<p>"SRE Reference Number Required"</p> <p>Use to require a sample reference number for signature recorded electronically (SRE) calls.</p>	Enforce the SRE Reference Number required validation.	Skip the SRE Reference Number required validation. (If the Ref # field is blank, it will be populated with the Row ID of the call.)	N
15	<p>"SRE Professional Type"</p> <p>Use to require that the professional type be valid for signature recorded electronically (SRE) calls.</p>	<p>The professional type (for example, "Physician") must match the value of this user property.</p> <p>If the value is null, all professional types are valid.</p>		null

Table 20. User Properties for Setting Sign and Submit Button Logic

Flowchart Reference	User Property	Action if Y...	Action if N...	Default Value
N/A	Submit Confirmation Note: If this user property does not exist (for example, in the standard Siebel Pharma application), behavior is equivalent to "Submit Confirmation" = Y.	Confirmation message appears when the Submit button is tapped.	No confirmation message appears when Submit button is tapped.	Y
N/A	Submit On Sign OK Note: If this user property does not exist (for example, in the standard Siebel Pharma application), behavior is equivalent to "Submit On Sign OK" = N.	Tapping the OK button on the Siebel Signature Capture display for new professional calls invokes the submit method. The submit method is not invoked for account calls nor for re-created professional calls.	Tapping the OK button on the Siebel Signature Capture display closes the display. To submit the call, tap the Submit button.	N

Validating the DEA Number in Siebel Pharma Handheld

In the U.S., the DEA number is a federally authorized number for physicians with a practice at a specific address.

In Pharma Handheld, the DEA number is stored at the address level for each physician. Pharma Handheld can confirm that a valid DEA number is populated at the selected address for a professional call. Depending on how your Pharma Handheld application is configured, the valid DEA number check can be performed at the time of entering the DEA number, upon launching the Siebel Signature Capture display, or both.

If:

- The product dropped is a controlled substance *and*
- The user property "Validate Address DEA Number" or "Validate Signature DEA Number" is true

then Pharma Handheld checks the validity of the DEA number by executing the algorithm described in [Table 21](#).

Table 21. The DEA Number Checksum Algorithm

Step	Algorithm	Example
1	The first two characters must be uppercase letters.	<i>BB1388568</i>
2	Sum the first, third, and fifth digits.	$1 + 8 + 5 = 14$
3	Sum the second, fourth, and sixth digits.	$3 + 8 + 6 = 17$
4	Double the number obtained in step 3.	$2 \times 17 = 34$
5	Sum the numbers from steps 2 and 4.	$14 + 34 = 48$
6	If the last digit of the DEA number is the same as the last digit of the number obtained in step 5, the DEA number is considered valid.	The last digit of <i>BB1388568</i> and <i>48</i> is the same, "8". This checksum indicates that the DEA number is valid.

Preparing Receipts for Calls in Siebel Pharma Handheld

As the Siebel administrator, you may be asked to print receipts for sample drops to a physician. From the Sample Event Administration view, you generate a list of sample drops and print receipts using the Sample Receipt report.

To print receipts for samples dropped

- 1 From the application-level menu, select **Navigate > Site Map > Samples Administration > Sample Event Administration**.
- 2 In the Sample Events list, create a query.
- 3 From the application-level menu, select **Navigate > Site Map > Reports** to open the Sample Events dialog box.
- 4 From the Select a Report drop-down list, select **Sample Receipts** and click **Run**.
- 5 To print the receipt, click the **Print** button in the Siebel Report Viewer window.

5

Data Filtering

The following topics are covered in this chapter:

- [“Developing Data Filters for Handheld” on page 87](#)
- [“Constructing Business Component and Business Object Filters” on page 88](#)
- [“Business Object Filters” on page 89](#)
- [“Recommendations for Managing Handheld Business Object Filters” on page 89](#)
- [“Examples of Default Business Object Declarations” on page 90](#)

Developing Data Filters for Handheld

The following general steps are recommended for developing Handheld synchronization filters.

- Identify the screens and views of your application. Then identify the business components that are required to support each screen and view, noting the areas where each business component occurs. For example, identify the form, list, or pick applets that are based on each business component.
- Within Siebel Tools, establish the base parent-child relationships and any reverse relationships at the component level.
- Review the business components that occur in picklists and consider creating business component filters for those that will cause large numbers of records to synchronize to the device. These filters are created and maintained in the Mobile Administration screens. For each business component, determine whether it is possible to apply a search specification to all instances of the business component within the Siebel Handheld application. Develop a set of suitable business component filters in the Mobile Administration screens.

Common examples of business components that are suitable for global business component filters include:

- Employees (for large organizations)
 - Activities (for example, filter for current Activities, Activities of only certain kinds)
 - Accounts (for example, by geography)
 - Products (for example, active, orderable products)
 - Orders (for example, open, closed in last three months)
- Create appropriate business object synchronization filters for each business object and make sure that each business object includes a default filter. Default filters make sure that users avoid accidental download of an excessive number of records.

Constructing Business Component and Business Object Filters

Business component filters are used to limit the extraction of a business component for every context in which it is extracted.

Example of Business Component Filter Syntax:

Business component filters use query by example (QBE) syntax.

```
[Status] = "Not Started" OR [Status] = "In Progress" OR ([Status] IS NULL) OR [Status] = "On Hold" OR ([Status] = "Done" AND [Done] >= Today() - 7)
```

For more information on QBE syntax, see *Siebel Developer's Reference*.

Business object filters are used to supply filters that a user can select at sync time. These are the filters that are displayed in the SetFilters dialog on the device.

Example of Business Object Filter Syntax:

Business object filters use predefined query (PDQ) syntax.

PDQ syntax rules are as follows:

- The business component name should be a valid business component in the business object on which the PDQ is based
- Search and Sort can be specified for all active buscomps in the business object on which the view is based, appended to each other in any order using space as delimiter.

The normal search spec and sort spec syntax applies except that quotes in the search spec have to be escaped using double quotes since the search spec itself is enclosed in double quotes.

The syntax is as follows. Descriptions of the terms are shown in [Table 22](#).

```
'Account'.Search = "[State] = LookupValue ( ""STATE_ABBREV"", ""CA"" )" 'Account'.Sort = "Name, Location"
```

Table 22. Business Object Filter Syntax

Syntax Term	Description
Account	business component name
Search	key word
"[State] = LookupValue (""STATE_ABBREV"", ""CA"")"	search specs using PDQ syntax
State	field name
LookupValue	function for find an LOV value
STATE_ABBREV	LOV type
CA	LOV value
'Account'.Sort = "Name, Location"	sort spec for sorting the returned list

For more information on PDQ syntax, see *Siebel Developer's Reference*.

Business Object Filters

All Siebel Handheld business object filters are available for selection by a user at the time of sync. Additionally, there is no naming convention for business object filters.

A default filter for a business object is indicated by checking the Default flag in the Administration-Mobile > Application Administration > Business Object Filters view of the Siebel Web client. Be sure to define a default filter for each business object in the Siebel Handheld application. If no filters are applied during the synchronization process, an unacceptably high volume of data will be downloaded to the handheld device.

CAUTION: You should select only one filter as the default for each business object. If two filters are marked as the default for the same business object, the actual default can be determined only by attempting to sync and selecting default filters from the sync client filter selection UI.

Recommendations for Managing Handheld Business Object Filters

The following section provides recommendations for creating and managing filters according to synchronization methods.

Companion Sync Deployments

Administrators typically provide their users with an initial set of Handheld business object filters and instruct them how to manage the synchronization filters themselves later. They are maintained in the Administration-Mobile > Application Administration > Business Object Filters view. This view is hidden from mobile users so they cannot create their own business object filters.

You manage these filters at the server level, then replicate any updates you make down to the companion computers via Siebel Remote. The Handheld user can then access the updated filters after performing a Companion Sync operation. For more information, see [“Setting Business Object Filters for Siebel Handheld Users” on page 50](#).

Additionally, there are several sample Handheld business object filters in the sample database, as well as in the Siebel 7.8 seed data.

Direct Server Sync Deployments

For Direct Server Sync deployments, administrators can create user-specific business object and business component filters in the Administration-Mobile > User Administration view. For more information, see [“Setting Business Component Filters for Siebel Handheld Users” on page 49](#) and [“Setting Business Object Filters for Siebel Handheld Users” on page 50](#).

Both application-level and user-level filters can be used in this deployment. They are managed in the same set of views. Changes to any filters will be effective on your next sync session, without having to restart the Handheld synchronization OM component.

These business object filters are made available to all end users and, therefore, must be defined with the needs of all end users in mind.

Examples of Default Business Object Declarations

You can set default business object declarations in the Administration-Mobile > Application Administration > Settings screen, as described in the following examples.

Example 1

"State Model" default business object setting:

```
State Model - Engine|0||State Model |[BusComp Name]="Expense"|State Model -  
Transition||State Model - State||State Model - Position|
```

The first three segments of the declaration are followed by a series of repeating BusCompName Search Spec pairs:

- 1 Business object name
 - 2 Visibility Type
 - 3 (Siebel internal)
 - 4 Root business component name
 - 5 Search spec QBE for root BusComp records
 - 6 Child business component name
 - 7 Search spec QBE for child BusComp records (this should normally be empty, causing all children to be extracted)
 - 8 Grandchild business component name
 - 9 Search spec QBE for grandchild BusComp records (this should normally be empty, causing all grandchildren to be extracted)
- and so on

The total number of fields must be at least 5 and must be an odd number.

Example 2

```
Action|0||Action||Action Employee|
```

This example default business object declaration results in an extraction of the Action and Action Employee business components where they occur with visibility 0 using the business object filter indicated. The business object filters are generally used only for extracting business components that do not correspond to any views or applets. Business object declarations identify specific business components within the business object to be extracted. The business object filters normally give a query based on the primary business component in the business object and force extraction of any business components mentioned in the query when there is no corresponding applet within the application that can cause the desired extraction to occur.

Example 3

In the following example, the declaration is used to extract all the Price List Line Items under the Order Entry (Sales) business object.

```
Default tBusObj s13= Order Entry (Sales) |0| |Price List Item|
```

Note that this declaration lacks an associated QBE clause. When this is the case, all of the records available to the user for the given visibility are extracted.

Exercise caution when modifying a default business object setting for pick applets, and do so only with the support of a skilled Siebel configurator.

Use default business object declarations to force the extraction of data for a given business component in the context of a given business object and Visibility type. For more information on visibility designations, see [“Designating Visibility” on page 91](#). The default business object extractions are performed in the first phase of data extraction.

You will most often use these declarations to extract additional data that is not extracted as part of the user interface extraction. This may be useful for business components that are referenced programmatically by other business components, but are not exposed in the user interface. The default business object declarations are used to enforce the extraction of a subset of data to the handheld that would not have been otherwise extracted or, most commonly, to filter the data downloaded for dynamic picklists or pick applets.

All pick data is not downloaded to the device due to the memory constraints on the device. Only pick data for fields that are editable is downloaded. Therefore, if you are doing a query on a pick field, you may not be able to display the picklist. When viewing a record in an applet, if a pick field is read-only, its pick button will be disabled. If end users select a read-only field with a pick control, they receive the following error: “No data available in picklist because field is read-only.”

Designating Visibility

It is very important that you use the correct visibility designation in the default business object declarations. The visibility entered should be the visibility that governs the data displayed for the business component within the context of the business object specified in the declaration. In the previous Example 1, visibility code 3 is designated. This corresponds to All Visibility, which is the visibility that applies to the Account business component when it is used in a pick applet.

You determine the correct visibility to use by examining View and business component properties within Siebel Tools. When creating a default business object declaration to restrict the volume of data extracted for a pick applet, begin by examining the Popup Visibility Type in Business Component Properties. Cross-reference the visibility type to the list below, and enter the appropriate visibility code in the declaration. If the Popup Visibility Type field on the business component is null, the default value is All. [Table 23](#) summarizes popup visibility types and the corresponding visibility codes.

Table 23. Visibility Codes

Popup Visibility Type	Visibility Codes
Sales Representative	0
Manager	1
Personal	2
All	3
None	4
Organization	5
Contact	6

NOTE: Do not use the Group, Catalog, or Sub Organization Popup Visibility Types. These are not supported in the CE handheld applications.

Overriding the Popup Visibility

If the Popup Visibility Type setting is not sufficiently restrictive (for example, All Visibility), this can lead to a large number of records being extracted when the picklist is processed during synchronization. Making the Popup Visibility Type more restrictive reduces the number of records extracted for picklists. The `OverridePopupVisibility` user property for an applet overrides the Popup Visibility Type on a business component. Use this property when the desired visibility differs from the business component's Popup Visibility Type, and you do not want to change the Popup Visibility Type. If several picklists use the same business component, you can also use the `OverridePopupVisibility` user property to vary the visibility of the picklists in the different applets.

There are two considerations you should keep in mind if multiple applications are sharing the same repository. First, changing the Popup Visibility Type has a global effect for all instances where the business component is used. If multiple applications share the same repository and use the same business components, changing the Popup Visibility Type for a common business component could have an undesirable effect for another application. Second, if multiple applications share the same applet, the picklist in each applet shares the same visibility as defined by `OverridePopupVisibility` property. This is because the `OverridePopupVisibility` property is set on the containing applet.

In Siebel Tools, navigate to Applet > Applet User Properties, and define the OverridePopupVisibility user property on the applet containing the control that opens the pick applet. See Table 24 for a description of the syntax. Assign a value to this property using the syntax shown, where <buscomp field n> is the underlying business component field of an applet control or column, and <visibility type> is the code corresponding to the desired visibility of the picklist’s business component. (See Table 23 for a list of the visibility codes.) Because the name of the OverridePopupVisibility parameter must be unique, append a unique number to the name of the parameter for any other picklists, for example, OverridePopupVisibility1, OverridePopupVisibility2, and so on.

Table 24. OverridePopupVisibility Syntax

Name	Value
OverridePopupVisibility	<buscomp field 1>, <visibility type>
OverridePopupVisibility1	<buscomp field 2>, <visibility type>
OverridePopupVisibility<n>	<buscomp field n + 1>, <visibility type>

NOTE: If OverridePopupVisibility is used, then the picklist and pick applet search specifications are ignored during synchronization when the records for the picklist are extracted.

6

Deployment of Siebel Handheld

This chapter includes the following topics:

- [“Overview of Server Installation in Support of the Siebel Handheld Client” on page 95](#)
- [“Process of Server Installation for Siebel Handheld Direct Server Sync” on page 97](#)
- [“About Siebel Handheld Synchronization Performance and Scalability” on page 100](#)
- [“Process of Installing the Siebel Handheld Application” on page 102](#)
- [“Installing Print Templates in the Siebel Handheld Install Directory” on page 107](#)
- [“Setting Up Siebel Handheld Application Installation on a CompactFlash Card” on page 107](#)
- [“Changing the SyncURL on Siebel Handheld Devices” on page 108](#)
- [“Installing the Siebel Handheld Application from External Media” on page 108](#)

Overview of Server Installation in Support of the Siebel Handheld Client

This section provides an overview of important factors to consider when planning Direct Server Synchronization (DSS) infrastructure. One aspect of successful planning and execution of a Siebel Handheld DSS deployment is to understand hardware and network requirements. While these factors are generally applicable to all deployments, there are unique aspects to each customer configuration and implementation strategy. Therefore, it is highly recommended that customers conduct detailed configuration, sizing, and production readiness reviews with Siebel Expert Services. This is especially important for complex deployments, such as those supporting large numbers of users over wide geographic areas.

You can also improve the performance and scalability of DSS deployments by working with the Siebel application server component parameters. For more information about the Siebel application server, see [“Optimizing Server Process Management for Direct Server Sync” on page 100](#).

NOTE: The recommendations in this chapter are general ones and are intended to raise your awareness of the key factors in handheld synchronization, performance, and scalability. These factors must be confirmed for your actual environment, and the usage patterns in your enterprise should be taken into consideration.

Server Topology Overview

The diagram in [Figure 4](#) shows the servers and components that are required to deploy Direct Server Sync. The components are the Siebel database, Siebel server, Siebel Web engine, and Siebel Handheld. The synchronization components are the Siebel Sync Engine which resides on Siebel server and the Sync client on Siebel Handheld.

CAUTION: Companion Sync uses Siebel Remote to complete the synchronization process to the Siebel server from the laptop. The remote mobile user's routing model must be set to Handheld User. Otherwise, sync will fail. For more information, see *Siebel Remote and Replication Manager Administration Guide*.

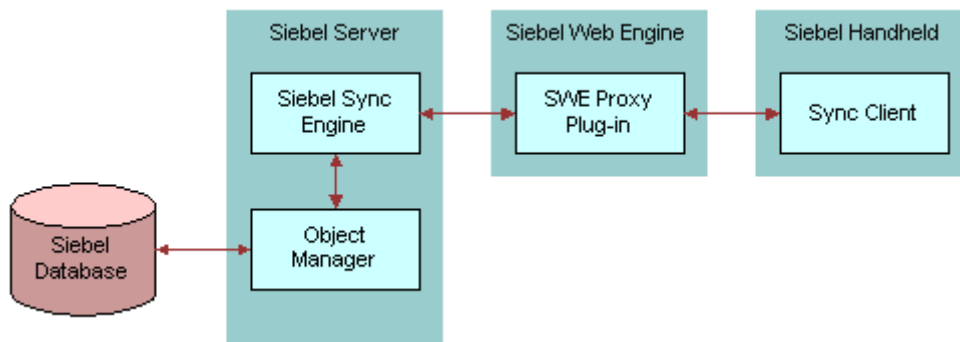


Figure 4. DSS Servers and Components

Recommended Hardware and Network Configuration

There are many factors to take into account when designing and implementing your server and network hardware and architecture, and sizing your database. The critical factor in sizing a handheld implementation is the expected peak synchronization load. Specific application variables to consider in calculating this load are: the number of concurrent users, number of transactions, and size of the data file. These variables should be considered within the context of the hardware specifications, including memory and processor speed.

The following resources are available as you plan your Siebel Handheld implementation:

- Refer to Microsoft and manufacturer documentation for comprehensive information on server hardware and registry parameters.
- Refer to Siebel Technical Note 405 for specific recommendations on the following topics:
 - Server Architecture
 - Server Hardware and Registry Parameters
 - Database Server Sizing
 - Database Tuning
 - Dial-Up and Network
 - Wireless
 - VPN (Virtual Private Networks)

- The Expert Services Handheld Review Package assists customers with planning their hardware and network for handheld implementations. Contact Siebel Expert Services for more information about this program.

Process of Server Installation for Siebel Handheld Direct Server Sync

The server components that are required for Siebel Handheld are installed when you install the Siebel server. See the Siebel Server installation guide for your operating system for details on installing and configuring Siebel server. The Siebel server installer copies the necessary DLLs to create an Object Manager for Direct Server Sync and creates and configures a Server Component and Component Group. The rest of this subsection describes which options you must select to correctly install the software, along with creating or configuring additional Object Managers.

This process includes the following tasks:

- [“Installing the Direct Server Sync Components Using the Siebel Server Installer” on page 97](#)
- [“Configuring Direct Server Sync Logging Levels” on page 98](#)
- [“Optimizing Server Process Management for Direct Server Sync” on page 100](#)

Installing the Direct Server Sync Components Using the Siebel Server Installer

Install the Siebel server, following the instructions in the Siebel server installation guide for the operating system you are using. When you reach the Setup Type screen in the Installer wizard, you are presented with three installation options:

- **Typical.** This setup option installs all Siebel server components except those displayed.
- **Compact.** This setup option installs only those components necessary to run the Siebel server, but no additional components or help.
- **Custom.** This setup option lets you customize your installation by choosing the specific components you want to install.

To install the Direct Server Sync components with your Siebel Server installation

- 1 During the Siebel Server installation, when the Setup Type screen appears, choose the Custom setting, and then click Next.

NOTE: At this screen, you may also choose a different directory for your Siebel server installation.

- 2 From the following components, choose Handheld Synchronization:

- Object Manager Component
- Handheld Synchronization
- Siebel Data Quality Connector

- Remote Search Support
- Siebel Java Integrator

NOTE: You must enable Handheld Synchronization to enable Direct Server Sync for your DSS installation.

3 Click Next.

Continue with the installation in *Siebel Installation Guide for Microsoft Windows: Servers, Mobile Web Clients, Tools*.

The install wizard automatically installs and configures the DSS components.

DSS Server Component Parameters

See [Table 25](#) for a list of required parameters. For information on adding DSS server components, see *Siebel System Administration Guide*.

Table 25. DSS Server Component Parameters

Parameter	Default Value	Description
ApplicationName	Siebel PharmaCE	The Siebel Handheld application. This value must match the name of the application as it is specified in Siebel Tools.
ApplicationTitle	Siebel Pharma CE	The name of the Siebel Handheld application as shown on the title bar on the browser. This parameter is only used if the Siebel application developed for the handheld is run on the Web client.
ApplicationSplashText	Siebel Pharma CE	The Siebel Handheld application name as shown on the splash screen. This parameter is only used if the Siebel Tools application developed for the handheld is run on the Web client.
ComponentName		Required for Direct Server Sync, it is entered in the registry on the handheld device.

Configuring Direct Server Sync Logging Levels

To set the logging level, you need to perform the following two tasks:

- ["To configure server logging levels" on page 99](#)
- ["To configure server logging levels using the Server Configuration screen" on page 99](#)

You set the logging level to a value between 1 and 5 as shown in [Table 26](#).

Table 26. Direct Server Sync Logging Levels

Logging Level	Results
1	Error listing
2	Warning listing
3	Information listing, including SQL tracing
4	Information listing
5	Debug

To configure server logging levels

- 1 Log into Server Manager from a (m:\siebel\bin\w32ud) prompt.
- 2 Run the following:
change evtlogvl HandheldSyncLog=[LogLevel] for comp [OMName], where [LogLevel] = an integer between 1 - 5 (5 enables all logging) and [OMName] = the OM name (for example, <ApplicationName>CEObjMgr_enu).

To configure server logging levels using the Server Configuration screen

- 1 Navigate to Administration - Server Configuration > Servers > Components.
- 2 In the Component list, query for the appropriate component, such as Handheld Sales CE (ENU).
- 3 In the Events list, search for the event type Handheld Sync Logging.
- 4 Set the value to a number between 1-5 and then save the change.
See [Table 26](#) for logging level results.

Configuring Companion Sync Logging Levels

To enable logging for Companion Sync process, you must add a parameter to the [pda] section of the CFG file.

To configure Companion Sync logging levels

- 1 Navigate to \client\bin\enu (or other language directory, such as \client\bin\fra).
- 2 Add the parameter HandheldSyncLogLevel and a valid value (1-5) to:
phce.cfg. For example, HandheldSyncLogLevel = 5.
See [Table 26](#) for logging level results.

Optimizing Server Process Management for Direct Server Sync

Several parameters are outlined below that help optimize server processing for Direct Server Sync.

To set parameters to optimize server process management

- 1 Log into the Siebel client as a user with Administrative responsibility.
- 2 Navigate to Site Map > Administration - Server Configuration > Servers > Components > Parameters.
- 3 In the Component Parameters sub-view, query for SalesCEObjManager.
- 4 Use the following table to update the parameters.

Parameter	Description
Max Tasks	Determines the maximum number of threads that can run concurrently for a given component. You should set the value of this parameter to a number equal to that of the expected peak number of concurrent synchronizations.
Min MT Servers	Determines how many multithreaded server processes are started by default for the Siebel Object Manager.
Max MT Servers	Defines the maximum number of processes supported by the instance of the Siebel Object Manager. The value for this parameter should be the same as Min MT servers and should be set so that threads per process (Max Tasks/Max MT Servers) is optimized.

About Siebel Handheld Synchronization Performance and Scalability

There are a number of factors that affect the performance and scalability of handheld synchronization. It is very important that administrators and those involved in the design and deployment of Siebel Handheld understand the impact of usage parameters on synchronization performance and scalability. For more information, see Technical Note 405 for application-specific variables affecting synchronization and data from synchronization scalability tests.

Using Multiple Synchronization Servers

As you scale your deployment, you may need to use multiple synchronization servers to accommodate all of your users. Your end users must be manually assigned to a particular server. Resonate products cannot be used for load balancing. Refer to Technical Note 405 and to your hardware manufacturer's documentation for more information on scaling deployments.

Providing Synchronization Security with Secure Sockets Layer

The synchronization data stream can be secured using Secure Sockets Layer (SSL). To employ SSL security:

- Make sure that a certificate has been created and installed on all Web servers that service handheld synchronization.

Use the following steps to install the root certificate on each handheld device.

To install the root certificate on the handheld device running PPC 2003 or newer

- 1 Navigate to the certificate authority server from your desktop computer.
- 2 Select the first option (retrieve the CA certificate or certificate revocation list), and click Next.
- 3 Click on Download CA certificate.
- 4 Click Save, and save as certca.cer on your desktop.
- 5 Use ActiveSync to copy the downloaded certificate, certca.cer, from the desktop to the My Documents folder on the handheld device.

NOTE: Make sure the certca.cer file is copied into the My Documents folder.

- 6 Go to My Documents and tap the certificate icon.

The certificate should be installed. You can validate it by going to Settings > System > Certificate.

- 7 Click the Root tab.

You should see the new certificate on the list.

- 8 Open up a browser and run the following command, substituting the appropriate server name, application name, UserName and Password (in red below).

```
https://<SERVERNAME>/<APPLICATION NAME>/  
start.swe?SWEEExtSource=siebelpda&SWEEExtCmd=ExecuteLogin&UserName=<USER  
LOGIN>&Password=<PASSWORD>
```

- 9 When a dialog appears, click Yes.

To complete root certificate installation on PPC 2002 device

- 1 From a web browser, navigate to the Microsoft Web site and download and launch the following executable file:

AddRootCert.exe.

- 2 Double-click to open the executable file.

A list of certificates appears.

- 3 Select certca.cer.
Information for the certca.cer Certificate appears.
- 4 Click Install Certificate.
- 5 Following successful installation, click OK.

Process of Installing the Siebel Handheld Application

Before you deploy the Siebel Handheld application, there are several tasks you need to perform.

NOTE: If you are setting up your Siebel Handheld application to allow end user translation functionality, see [“Installing and Setting Up End User Translation Functionality”](#) on page 31.

This process includes the following tasks:

- [“Editing the Handheld Application Installation Configuration File”](#) on page 102
- [“Enabling Handheld User Database Backup”](#) on page 105
- [“Deploying Patches to the Handheld Application with Direct Server Sync”](#) on page 109
- [“Deploying Handheld Application Patches with Companion Sync”](#) on page 110
- [“Creating Handheld Application Upgrade Kits for Companion Sync PDA”](#) on page 111
- [“Downloading Patches to the Handheld Device”](#) on page 112

Editing the Handheld Application Installation Configuration File

The Siebel Handheld application setup.ini file configures the Siebel Handheld Client application installer. Before you deploy a custom-configured Siebel Handheld application, you must update the parameters in the setup.ini file so that the correct values are written to the device registry before distributing the client installer to end users.

The setup.ini file resides in the Siebel Handheld application directory. To modify this file, create a Siebel Handheld installation directory on the network, or create and duplicate a custom DVD-ROM for distribution to end users. This installation directory must include the same files and directory structure as the original DVD-ROM. Then, modify the setup.ini file in the custom installation directory.

NOTE: If you wish to set up parameter values other than default values, add the parameter to the setup.ini file and add the proper values.

Table 27 lists the parameters that you may need to modify in the setup.ini file, their default value, and a description of the parameter.

Table 27. Siebel Handheld setup.ini Parameters

Parameter	Default Value	Description
Version	7.8	Version of the desktop Siebel application against which the Siebel Handheld version synchronizes.
Application Title	Siebel PharmaCE	The Siebel Handheld application. This value must match the name of the application as it is specified in Siebel Tools.
ApplicationName	Siebel Pharma CE	The Siebel Handheld application. This value must match the name of the application as it is specified in Siebel Tools.
ApplicationSplashText	Pharma CE Handheld	The Siebel Handheld application name as shown on the splash screen.
EnableRemote	N	Used for Integrated Sync. The default value is "N". Valid values are "Y" = [Enable Remote Sync] checkbox is selected, "N" = [Enable Remote Sync] checkbox is unselected in handheld sync window.
MultiCurrency	True	Required for the application to handle multiple currencies.
SyncURL	<i>http://Web Server Name or IP address/ Virtual Directory Name</i>	Required for all synchronization methods. This value is entered in the registry on the handheld. See "Changing the SyncURL on Siebel Handheld Devices" on page 108 for more information on this parameter.
[EndUserLocalization] Section		
User DefinedLang	Y	
LogUserDefinedLangErrors	N	
[Printing] Section		See Appendix F, "Print Configuration Settings," for more information on the parameters used to configure printing.
[Backup] Section		Enables handheld database backups. See "Enabling Database Backup" on page 106 for more information on settings for the parameters in this section of the setup.ini file.

Table 27. Siebel Handheld setup.ini Parameters

Parameter	Default Value	Description
[ApplicationLocation] Section		Specifies where the Siebel Handheld application and database are installed. See “Setting Up Siebel Handheld Application Installation on a CompactFlash Card” on page 107 for more information on the parameters in this section of the setup.ini file.
InternetOptionReceiveTimeout	600000	Length of time to receive data (except data extraction) from the server before the handheld client times out. This parameter only applies to synchronizations using Direct Server Sync. In milliseconds. The default value, 600000, is 10 minutes.
InternetOptionSendTimeout	600000	Length of time to send data to the server in a single call the handheld client times out. This parameter only applies to synchronizations using Direct Server Sync. In milliseconds. The default value, 600000, is 10 minutes.
InternetOptionDataExtractionTimeout	900000	Length of time to extract data from the server to the handheld device the handheld client times out. This parameter only applies to synchronizations using Direct Server Sync.
[Logging] Section		
TXNErrorLevel	1	This level controls the extent of transaction error information received from the server. The default value is 1. Valid values are 0 = no log information, 1 = report txn errors in the client log, txnerror.hh. A “Transaction Errors Reported” message appears during sync when txn errors occur. To view errors, double click the message.

Table 27. Siebel Handheld setup.ini Parameters

Parameter	Default Value	Description
DefaultLogLevel	2	<p>The default value is 2. You can set the value to any of the following:</p> <ul style="list-style-type: none"> -1 = NO LOGGING 0 = LOG_SYSTEM 1 = LOG_ERROR 2 = LOG_WARNING 3 = LOG_INFO, INCLUDING SQL TRACING 4 = LOG_DEBUG <p>The log messages with level equal to or lower than the set value will be logged. For example, if the default log level is set to 2, the messages belonging to System, Error, and Warning log levels will be logged. If the DefaultLogLevel is -1, no logging will be provided.</p>
MaxLogFileSize	2000	<p>This is the maximum log file size in KB. If the program finds the size of the latest log file is greater than this value, a new log file should be used for logging.</p>
MaxSavedLogFiles	3	<p>Determines the number of log files to save on the device. It does not include the one currently used by the program. If the value is set to 2, then the valid log file names are siebel_log.txt, Siebel_log1.txt, and siebel_log2.txt. Siebel_log.txt is the current log file. Siebel_log1 is an older one and Siebel_log2 is the oldest.</p>
PressureThreshold	29	<p>Prompts user to restart application after 30 visits, thereby freeing application memory.</p>

Enabling Handheld User Database Backup

Siebel Handheld infrastructure provides a way to automatically back up a snapshot of the user's database and current settings, and to restore those settings in the event of a total device failure. The backup functionality automatically copies all the necessary files to a single compressed file. Each time the user backs up, the backup process creates a new copy of the file and deletes older backups. The backup process must close the application in order to copy the RDBMS and handheld configuration files. After the files are copied, it automatically restarts the application.

The backup feature must be enabled in the application. If the backup feature is enabled, a backup is created during every synchronization. This way, the user retains an up-to-date snapshot of the database, and older backup versions are removed.

When the database backup feature is enabled, a database backup occurs automatically at the end of each synchronization. This makes the overall time to synchronize somewhat longer. The size of the database and the speed of the CompactFlash card also affect the time it takes to complete synchronization.

NOTE: Backups should not be used as a replacement for synchronization.

Setting Up Database Backups

In order to back up the database you must do the following:

- Provide users with an external memory card.
- Install the Siebel Handheld application with the backup functionality enabled. See, [“Enabling Database Backup” on page 106](#).
- Instruct users to back up their database on a regular basis.

Backing Up to External Media

It is recommended that you back up to external media—for example, a CompactFlash card or the embedded backup storage that is included in many devices.

Enabling Database Backup

Before users can back up the database on their handheld devices, you must first enable the Backup menu item on the Siebel Handheld application. This requires editing the setup.ini file to enable backup.

NOTE: Backup should be kept on external media or built-in storage. Trying to set the location to the main memory, such as \My Documents, will not work.

The following is an example of the default settings for the backup parameters:

```
[Backup]
BackupLocation = \Storage Card\Siebel Backup
BackupEnabled = N
```

- BackupEnabled = [Y/N] The default is N (No). Change this setting to Y (Yes) to enable the Backup menu item and to trigger a backup to occur automatically after each synchronization.

If the product is installed with Backup = N, the backup menu item is disabled. You need to change the parameter, then reinstall the product in order to enable the menu item.

- BackupLocation = [Backup location] The default is an external storage card. Specify the location where you want the data backed up.

For more information on the setup.ini file, see [Chapter 8, “Installing the Handheld Application.”](#)

Restoring from a Backup

For information on restoring a database from a backup, see [“Backing Up and Restoring Data with the Siebel Handheld Client”](#) on page 133.

Installing Print Templates in the Siebel Handheld Install Directory

If your application allows printing, you must include all print templates in the template subdirectory of the Siebel Handheld Install directory. The print templates are language-specific, so copy the templates to the template subdirectory within the language directory of the language you are deploying (for example, ...\\ENU\\Template). If the template includes double byte characters, such as Japanese string, you must save the template files as Unicode (UTF16) files. For supported language codes, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

See [Appendix F, “Print Configuration Settings”](#) for more information about Printing.

Setting Up Siebel Handheld Application Installation on a CompactFlash Card

The default, when installing Siebel Handheld applications, is to install both the application and the database into RAM on the device. In most instances, there is sufficient available memory, and end users are satisfied with the application performance. There are situations, however, where you may need to optimize storage on the device.

If you need to maximize main memory availability, you can install the application binary files on an external location such as a CompactFlash card. Installing the data on the CompactFlash card is not recommended because performance likely degrades.

You can specify, in the application's setup.ini file, where the application files and database files are to be installed. By default, this is set to the handheld device. In the ApplicationLocation section of the setup.ini file, there are two parameters. The following shows the default settings for these parameters:

```
[ApplicationLocation]
ApplicationBinariesLocation = Device
ApplicationDataLocation     = Device
```

- ApplicationBinariesLocation = Device. The default is Device. The other value is CF (CompactFlash).
- ApplicationDataLocation = Device. The default is Device. It is recommended that you always install the data files on the device.

After you have edited the setup.ini file, follow the instructions for installing the Siebel Handheld application on the client.

Changing the SyncURL on Siebel Handheld Devices

For Direct Server Sync (DSS), SyncURL is used to locate the Web Server and the virtual directory so that the handheld synchronization client can communicate with the handheld synchronization server. For example:

SyncURL = http://web server name or IP address/virtual directory name

You can reset the SyncURL by re-installing the application with the updated setup.ini file.

For Companion Sync set up, the SyncURL parameter identifies the configuration file that will be accessed on the handheld client for synchronization.

For example, the default configuration file for Pharma Handheld is named phce.cfg. For companion sync set up, the SyncURL value should be http://xxxx/phce where xxxx could be any text string.

Installing the Siebel Handheld Application from External Media

Users who synchronize in DSS mode may not have a PC, and so may not be able to create a partnership and synchronize using Microsoft ActiveSync. You can install the application for each user through a standard partnership, or you can configure a stand-alone installer.

During the installation, the InstallShield Wizard screen prompts you by asking,

Would you like to deploy a CAB file to enable rapid installation for additional devices?

You can configure a stand-alone installer by selecting Yes.

You are prompted to select a language for the application and to specify a location for the CAB file. The installer creates the CAB file in the location you specify.

The CAB file is a self-extracting file that includes all the files needed to install the Siebel Handheld application on the handheld device. When you single-click the file, the CAB file installs the application.

You may create an image of the Handheld Installer that can be loaded onto external media such as a CompactFlash card. When you create a stand-alone installer platform, a Cabinet file (CAB) is created in a location that you specify. The CAB file name should be siebel.pocketpc_arm.CAB. You can copy the CAB file to a CompactFlash card, insert the card into the handheld device, and single-click on the file to install the Siebel Handheld application on the device.

NOTE: When installing the application on the device, the end user is asked if he or she wants to install the application in the default directory. Regardless of the user's answer, the application is always installed in the directory specified by the setup.ini file. Therefore, the only way to change the directory the application is installed in is to modify the parameters in the ApplicationLocation section of the setup.ini file.

Distributing Siebel Handheld Application Patches

The Siebel Handheld patch delivery mechanism, PatchAgent, is a tool that automates the deployment of patches to handheld devices as part of the synchronization process. It allows administrators to distribute patches to end users with minimal involvement by the users.

During synchronization the PatchAgent executable is called, and if it detects a handheld patch, it automatically installs the patch on the handheld device. In order for PatchAgent to detect and deploy the patch, the patch files must be created and placed in the directory where PatchAgent expects to find the files.

Deploying Patches to the Handheld Application with Direct Server Sync

In order to set up patch deployment for Direct Server Sync users, you need to patch the Siebel server and patch one handheld client which serves as the “model” from which patch files are pulled. Then the patch files are then packaged and placed in the location on the server where PatchAgent expects to find the files. The next time the end user synchronizes with Siebel server, the patch is installed onto his or her device.

For more information on how the patch process works with synchronization, see [“Downloading Patches to the Handheld Device”](#) on page 112.

To set up patch deployment

- 1 On Siebel server, verify that the following directories exist. If they do not, create the directories.
 - C:\patch\AppBinDir
 - C:\patch\WinDir

NOTE: You may specify a drive other than C:. However, the directory names must be specified as shown above.
- 2 Apply the patch to Siebel server.
- 3 Apply the patch to one handheld client.
- 4 Examine the handheld directory (My Device\Program Files\Siebel Handheld) and copy the files with the latest date to the Siebel Server directory (C:\patch\AppBinDir).
- 5 Examine the handheld directory (My Device\Windows) and copy the files with the latest timestamp to the Siebel Server directory (C:\patch\WinDir).
- 6 From the DOS prompt, change directory to *Siebel Root*\SWEApp\BIN.
- 7 Execute the following command to stage the patch files and the patchlist.txt in the correct location on the server:

```
C:\Siebel Root\SWEApp\BIN>createpatchlist /s c:\patch /t c:\Siebel  
Root\sweapp\cepatch
```

/s – source directory. The directory where the patch files were moved.

/t – target directory. The directory where PatchAgent checks for the patch files.

NOTE: You may specify a drive other than C:. However, the location of the source and target directories must be specified exactly as shown.

After the patch files have been moved and the patch list created, the following message appears: “Patch List has been successfully created in *Siebel Root\SWEApp\cepatch* files transferred successfully.”

The patch files are now ready to be deployed to Direct Server Sync end users.

Deploying Handheld Application Patches with Companion Sync

In order to set up patch deployment for Companion Sync users, you need to create a “model” of a patched Siebel Mobile Web Client and a patched handheld client. Then you pull the designated patch files and place them in the correct directory on the end user’s Mobile Web Client. You may use Siebel Anywhere to create upgrade kits to automate this process of distributing patch files to your end user’s Mobile Web Client. The next time the end user uses Companion Sync to synchronize their handheld device with the Siebel Mobile Web Client, the patch is installed on the device.

For more information on how the patch process works with synchronization, see [“Downloading Patches to the Handheld Device” on page 112](#).

To set up patch deployment

- 1 On Siebel server, verify that the following directories exist. If they do not, create the directories.
 - C:\patch\AppBinDir
 - C:\patch\WinDir
- 2 Apply the patch to Siebel server.
- 3 Apply the patch to Siebel Mobile Web Client.

This Mobile Web Client serves as the model from which the patch files can be pulled.
- 4 Apply the patch to one handheld client.

This handheld client serves as the model from which the patch files can be pulled.
- 5 Examine the handheld directory (My Device\Program Files\Siebel Handheld) and copy the files with the latest date to the Siebel Server directory (C:\patch\AppBinDir).
- 6 Examine the handheld directory (My Device\Windows) and copy the files with the latest timestamp to the Siebel Server directory (C:\patch\WinDir).
- 7 From the DOS prompt, change directory to C:\Siebel Root\SWEApp\BIN.

- 8 Execute the following command to move the patch files to the correct location and generate a patchlist.txt file:

```
C:\Siebel Root\SWEApp\BIN>createpatchlist /s c:\patch /t c:\Siebel
Root\sweapp\cepatch_xxx (where xxx is the language [enu, esn, and so on])
```

/s – source directory. The directory where the patch files were moved.

/t – target directory. The directory where PatchAgent checks for the patch files.

NOTE: You may specify a drive other than C:. However, the location of the source and target directories must be specified exactly as shown.

After the patch files have been moved and the patch list created, the following message appears: “Patch List has been successfully created in *Siebel Root\SWEApp\cepatch_xxx* files transferred successfully.”

- 9 Create the following directory on the end user’s Mobile Web Client: *Siebel Root\client\cepatch_xxx* (where xxx is the language [enu, esn, and so on]), and push the files from the *\Siebel Root\SWEApp\cepatch_xxx* directory on Siebel server to the *Siebel Root\client\cepatch_xxx* on the Mobile Web Client.

NOTE: Siebel Anywhere upgrade kits can be used to carry out this step.

Creating Handheld Application Upgrade Kits for Companion Sync PDA

NOTE: This step is optional. Additionally, you must have a license for Siebel Anywhere to distribute patches to end users.

You may use Siebel Anywhere upgrade kits to remotely distribute self-extracting zip files to your end users’ PCs. You can use self-extracting zip files to create new directories and immediately extract files into the directories. Create one upgrade kit for each of the following:

- Create the Siebel Mobile Web Client upgrade kit (Siebel Client Revisions).

Navigate to the Siebel image location for the current software version such as D:/Siebel_Install_Image/7.8.1.0, and then navigate to the patch directory. Configure the zip file to self-extract in the *Siebel Root\client\BIN* directory on the end user’s Mobile Web Client.

- Create the Siebel Handheld upgrade kit (Siebel Client Revisions).

Create a self-extracting zip file that includes the files in the *Siebel Root\SWEApp\cepatch* directory on the server. Configure the zip file to self-extract in the *\client\cepatch* directory on the end user’s Mobile Web Client.

- Create any other upgrade kits as needed (for example, the Siebel Customer Repository File).

See *Siebel Anywhere Administration Guide* for detailed information on creating upgrade kits.

NOTE: If there are read-only files on the Mobile Web Client, the end user may need to change the file attributes to read-write before receiving and installing the upgrade kits. Contact Siebel Technical Support for the list of files whose attributes need to be changed. You may use Siebel Anywhere to distribute a batch script that makes this change.

Downloading Patches to the Handheld Device

Patches are downloaded as part of the synchronization process. Once the patch is staged, the patch is downloaded the next time the end user synchronizes the handheld with Siebel server. The end user synchronizes as he normally would using Direct Server Sync or Companion Sync. First, any transactions are uploaded from the handheld device. Then:

- If a patch needs to be applied to the handheld, the synchronization process terminates, and the patch process is started, which downloads the patch.
- If no patch needs to be applied, the synchronization process continues until the process is complete.

After a successful patch installation, Siebel Handheld Sync will launch automatically and continue the extraction.

If the patch files are not successfully downloaded, the end user is prompted to restart the patch process. The end user must locate and launch patchagent.exe manually. Then, once the patch is successfully installed, the end user is prompted to complete the synchronization.

7

Synchronization Conflict Handling and Recovery with Handheld

This chapter includes the following topics:

- [“Preventing Synchronization Transaction Conflicts with Siebel Handheld” on page 113](#)
- [“Recovering Error Data in Siebel Handheld” on page 119](#)

Preventing Synchronization Transaction Conflicts with Siebel Handheld

When multiple end users synchronize with a remote database, transaction conflicts may occur which can result in data loss. The Extended Pick and Insert Failure functionality minimizes synchronization conflicts. If transaction conflicts are unavoidable, then Siebel Handheld Sync Service captures the transaction information so that the data can be recovered. The combination of these features eliminates the potential for data loss.

There are two features that minimize synchronization transaction conflicts.

- Extended Pick processing
- Insert Failure processing

The next several sections describe these features in detail.

Extended Pick Processing in Siebel Handheld

The handheld is used to capture and record transactions entered by the handheld user. During synchronization, these transactions are processed on the server. A situation may arise in which a transaction fails when it is applied to the Siebel server (through Direct Server Sync) or Siebel Mobile Web Client (through Companion Sync)—both of which are referred to as server. For example, a Siebel Pharma Handheld user creates a professional call activity for one of his contacts. However, since he last synchronized with the server, the contact involved in this transaction was deleted from the server database. When he tries to synchronize his handheld, the server does not find his contact, and the call activity for the contact cannot be inserted into the server database. To generalize this example, any transaction that involves data selected through picklists or pick applets fails on the server if that pick data is not present at the time of synchronization.

With many handheld users synchronizing with Siebel server and modifying data at different times, this scenario is not uncommon.

The following describes how a pick transaction is recorded on the handheld device and processed on the server during synchronization. Assume that the handheld user wants to create a new call activity for the contact. In order to do this, the user inserts a new record in the Professional Call screen and “picks” the desired contact. When the contact is selected on the handheld, the Row Id of the contact (Contact Id) is recorded. However, on the handheld, the application does not record any of the pick map fields associated with the contact; only the Contact Id is recorded. When the user synchronizes his handheld, that Contact Id is used to locate the contact record in the server database. The Contact Id is then used to retrieve all of the fields used in the pick map for the Contact Id (Last Name, First Name, Middle Initial, Address, City, State, Zip Code, and so on).

In order to minimize pick processing failures, the handheld must record the pick row Id and all of the pick map data that is required for a successful transaction. This data must be recorded at the time of the pick, so that it can be passed to the server for processing. This enhanced functionality is called Extended Pick processing. Now, when the user synchronizes, the transaction is processed on the server as follows:

- The synchronization process first looks for the pick record on the server database. For example, to add an activity it looks for the contact and, if it finds the contact, it retrieves the necessary data and adds the activity. This is the default behavior.
- If the server does not find the pick map record in the database and extended pick processing is enabled, it retrieves the pick record Id and pick map data from the handheld transaction and applies the data directly to the server.

Enabling Extended Pick Processing in Siebel Handheld

You can enable Extended Pick processing globally or at the business component level when configuring the Siebel Handheld application. When the *DefaultHandheldSyncPickMode* parameter is enabled every handheld pick transaction is subject to pick processing.

To enable extended pick processing globally

- 1 From the application-level menu, choose Navigate > Site Map > Administration-Mobile > Application Administration.

- 2 Click the Settings view tab, then Query on the following value:

DefaultHandheldSyncPickMode

If there is no such record, a new record with that value should be created. See [Table 28](#) for the values to enter.

Table 28. Application Settings

Setting Name	Value	Description
DefaultHandheldSyncPickMode	NoFail	Turns Extended Pick processing ON.
	FailOnError	Turns Extended Pick processing OFF This is the default behavior if the parameter is not specified in the Settings view.

To enable extended pick processing at the business component level

- When enabling extended pick processing at the business component level, the user property is defined on specific business components. The syntax for setting Extended Pick on a business component and the parameter values ([Table 29](#)) follow:

HandheldSyncPickMode=Fieldname|Mode

Table 29. Business Component User Property Parameters

Business Component User Property	Parameter	Value	Description
HandheldSyncPickMode	<i>Fieldname</i>	—	Specify the field name as defined in Siebel Tools.
	<i>Mode</i>	NoFail	Turns Extended Pick processing ON.
		FailOnError	Turns Extended Pick processing OFF.

You may apply Extended Pick processing to multiple fields in a single business component, using the following syntax:

HandheldSyncPickMode=Fieldname1|Mode1, Fieldname2|Mode2

The setting on the business component takes precedence over the setting defined in the Settings view. For example, you can use the business component setting to nullify the global application of Extended Pick. Conversely, you can enable Extended Pick processing on specific business components if the setting in the Settings view has disabled the functionality.

For more information, see *Using Siebel Tools*.

[Table 30](#) shows the combined effect of the settings in the Application-Mobile > Settings View and on a business component.

- The DefaultHandheldSyncPickMode setting is omitted from application settings.

- If there is no setting on a particular business component, the setting defined in the Settings view applies.
- If there is no setting defined in the Settings view, or on the business component, the default behavior is for Extended Pick to be turned OFF.

In [Table 30](#), read down the Tools configuration column and across to the Mobile Administration View Setting to see the combined result. For example, a NoFail configuration in Tools combined with a FailOnError setting in the Mobile Administration View results in the combined effect NoFail.

Table 30. Combined Effect of Extended Pick Settings for Business Components

Tools Configuration (User Property) HandheldSyncPickMode=	Mobile Administration View Settings DefaultHandheldSyncPickMode=		
	NoFail	FailOnError	Omitted
NoFail	NoFail	NoFail	NoFail
FailOnError	FailOnError	FailOnError	FailOnError
Omitted	NoFail	FailOnError	FailOnError

Recommended Extended Pick Processing Settings

It is recommended that you use the Extended Pick processing settings in the following way:

- **Pharma Professional Call - CE.** Last Name|NoFail, Address|NoFail, Contact Id|NoFail, Contact Address Id|NoFail
- **Pharma Call Products Detailed - CE.** Name|NoFail
- **Pharma Call Sample Dropped - CE.** Name|NoFail, Lot Name|NoFail
- **Pharma Account Call - CE.** Account Name|NoFail, Address|NoFail, Account Id|NoFail, Account Address Id|NoFail
- **Pharma Promotional Items Dropped - CE (Name).** Name|NoFail

The Pharma Handheld application is shipped with these recommended settings.

Insert Failure Processing in Siebel Handheld

When the server executes an insert transaction and the insert fails, there are two ways the insert failure can be handled:

- A record is logged that indicates the insert failed, and synchronization continues. This is the default insert behavior. The Conflict Administration screen can be used to recover the data.

- The insert failure is logged, including details of the failure, and synchronization is interrupted. This is the FailOnError behavior. FailOnError behavior guarantees that, should an insert fail, data loss does not occur since synchronization is stopped until the circumstances causing the failure are resolved.

NOTE: If FailOnError processing takes place, synchronization is interrupted. The synchronization process continues to fail until the problem is resolved. End users must contact their system administrators to recover from the failure. The recovery effort may involve modifying transactions queued for processing, modifying data on the server, or reentering transactions through the Siebel Handheld application.

Handling Insert Failures

You can enable Extended Pick processing globally or at the business component level when configuring the Siebel Handheld application. The following setting applies globally throughout the application. When FailOnError is specified, every failed insert interrupts synchronization.

DefaultHandheldInsertMode.

You can specify the value for this setting through the Settings view in the Administration-Mobile screen.

Table 31 shows the settings for this parameter.

Table 31. Insert Failure Processing Parameter Setting

Parameter	Mode Value	Description
DefaultHandheldInsertMode	NoFail	Insert failures are logged and synchronization continues. This is the default behavior.
	FailOnError	Insert failures are logged and synchronization terminates. The system administrator must intercede to recover from this failure.

Optionally, you can enable Extended Pick processing at the business component level.

HandheldInsertFailMode=Mode

The user property is defined on specific business components. The setting in the business component takes precedence over the setting defined in the Settings view. [Table 32](#) shows the syntax for setting the Insert Fail Mode on a business component and the parameter values. These settings are made in Siebel Tools.

Table 32. Business Component User Property Parameter

Business Component User Property	Parameter	Value	Description
HandheldInsertFailMode	Mode	NoFail	Insert failures are logged and synchronization continues. This is the default behavior.
		FailOnError	Insert failures are logged and synchronization terminates. The system administrator must intercede to recover from this failure.

[Table 33](#) shows the combined effect of the setting in the Settings view and the setting on a business component.

- The business component setting always takes precedence over the settings defined in the Administration-Mobile > Settings view.
- If there is no setting on a particular business component, the Applications Settings value applies.
- If there is no setting in either the Settings view or on the business component, the default behavior is the same as NoFail. Insert failures are logged and synchronization continues.

In [Table 33](#), read down the Tools Configuration column and across to the application settings value to see the combined result. For example, a NoFail BC setting combined with a FailOnError application setting results in the combined effect NoFail.

Table 33. Combined Effect of Insert Failure Settings

Tools Configuration (User Property)	Application Settings Value		
HandheldInsertFailMode=	DefaultHandheldInsertMode=		
	NoFail	FailOnError	Omitted
NoFail	NoFail	NoFail	NoFail
FailOnError	FailOnError	FailOnError	FailOnError
No Setting on Business Component	NoFail	FailOnError	NoFail

Recommended Insert Failure Processing Settings

It is recommended that you use the insert failure processing settings in the following way:

Recovering Error Data in Siebel Handheld

Selected synchronization and conflict errors are captured to the database, and can be accessed through the Conflict Administration screens. This mechanism is always enabled. For more information on recovering error data, see [“Obtaining Error Details from Siebel Handheld Synchronization Sessions”](#) on page 67.

8

Installing the Handheld Application

This chapter includes the following topics:

- [“Preparing to Upgrade from a Previous Siebel Handheld Release” on page 121](#)
- [“Installing the Siebel Handheld Application” on page 121](#)
- [“Reinstalling the Siebel Handheld Application” on page 124](#)
- [“Uninstalling the Siebel Handheld Application” on page 124](#)

Preparing to Upgrade from a Previous Siebel Handheld Release

The Siebel Handheld application cannot be upgraded directly on the device. To upgrade your existing application and to migrate your data and settings to Siebel 7.8 use the following process:

- Back up the handheld device by synchronizing to your database. See, [“Synchronizing Data on the Siebel Handheld Device” on page 135](#).
- Uninstall your Siebel Handheld application. See, [“Uninstalling the Siebel Handheld Application” on page 124](#).
- Then install the new version of your Siebel Handheld application. See [“Installing the Siebel Handheld Application” on page 121](#).

Installing the Siebel Handheld Application

There are two ways to install software onto any Windows-powered handheld device. The first is to create a partnership between a desktop or laptop PC and the handheld device using Microsoft ActiveSync. The second is to install the application from type of external media.

NOTE: It is important to remember that end users must synchronize their handheld devices to download the application configuration and populate the database before they can use the application. Therefore, an administrator may install the application for an end user, but the synchronization must occur using the end user’s name and password.

Installing Handheld for Companion Sync Users

The following procedure lists the Handheld installation steps for Companion Sync users:

To install the Siebel Handheld application using Companion Sync

- 1 Using Microsoft ActiveSync, establish a partnership between the handheld device and the PC.
- 2 On the PC network or DVD-ROM, locate the folder where the Siebel Handheld Application folder is installed, then double-click setup.exe.

The installation process begins.

- 3 From the Choose Setup Language window, choose the language you want to use for the installation and click OK.
- 4 At the Synchronization Options screen, choose the Companion Sync option and then click Next.
The next screen displays and asks, "Would you like to deploy a CAB file to enable rapid installation for additional devices?"

NOTE: If you want to create a stand-alone installer, choose Yes, and then click Next.

- 5 To install the application on the device, click Next.
- 6 Select the desired language of the Siebel Handheld Application, and click Next.

A window appears showing the setup status, followed by several DOS windows.

- 7 The Add/Remove Programs dialog appears. This is followed by the Installing Applications dialog that asks if you want to install in the default directory. Click Yes to install the Siebel Handheld application on the handheld device.

NOTE: The default directory in the Applications dialog is the directory specified by the system administrator in a setup file. So that the application works correctly, the Siebel Installer installs the application in the default directory. Therefore, even if you specify a different location for the application, the application is installed in the default location.

During the installation, the Installing Applications dialog box displays a progress bar. It may take several minutes to install on the handheld device. When the application has been downloaded to the handheld device, the Application Downloading Complete dialog box displays on the PC.

- 8 Click OK.

A window appears informing you that setup has finished installing the Siebel Handheld application on your computer.

- 9 Click Finish.

After installing the Siebel Handheld application and Siebel Handheld Sync, you must perform an initial synchronization before the application can be used. Refer to ["Synchronizing Data on the Siebel Handheld Device" on page 135](#) for the procedure for synchronizing your data.

See [Chapter 5, "Data Filtering,"](#) for more information on using Direct Server Sync and setting filters.

Installing Handheld for Direct Server Sync Users

Most DSS users do not have access to a PC for creating a partnership with their handheld device. In this case, the administrator has to create a temporary partnership with each user's device and install the application. Siebel Handheld applications can be installed in DSS mode using the Siebel Installer as described in this section.

To install the Siebel Handheld application using DSS

- 1 Using Microsoft ActiveSync, establish a partnership between the handheld device and the PC.
- 2 On the PC network or DVD-ROM, locate the folder where the Siebel Handheld Application folder is installed, then double-click setup.exe.

The installation process begins.

- 3 From the Choose Setup Language window, choose the language you want to use for the installation and click OK.
- 4 At the Synchronization Options screen, choose the Direct Server Sync option and then click Next.

The next screen displays and asks, "Would you like to deploy a CAB file to enable rapid installation for additional devices?"

NOTE: If you want to create a stand-alone installer, choose Yes, and then click Next.

- 5 To install the application on the device, click Next.
- 6 Select the desired language of the Siebel Handheld Application, and click Next.

A window appears showing the setup status, followed by several DOS windows.

- 7 The Add/Remove Programs dialog appears. This is followed by the Installing Applications dialog that asks if you want to install in the default directory. Click Yes to install the Siebel Handheld application on the handheld device.

NOTE: The default directory in the Applications dialog is the directory specified by the system administrator in a setup file. So that the application works correctly, the Siebel Installer installs the application in the default directory. Therefore, even if you specify a different location for the application, the application is installed in the default location.

The Siebel Handheld installation automatically installs SSCE Service Pack 1 and overwrites existing files on your system. A message may appear asking if you want to replace existing files. Respond by tapping "Yes to All."

During the installation, the Installing Applications dialog box displays a progress bar. It may take several minutes to install on the handheld device. When the application has been downloaded to the handheld device, the Application Downloading Complete dialog box displays on the PC.

- 8 Click OK.

A window appears informing you that setup has finished installing the Siebel Handheld application on your computer.

- 9 Click Finish.

After installing the Siebel Handheld application and Siebel Handheld Sync, you must perform an initial synchronization before the application can be used. Refer to [“Synchronizing Data on the Siebel Handheld Device” on page 135](#) for the procedure for synchronizing your data.

See [Chapter 5, “Data Filtering,”](#) for more information on using Direct Server Sync and setting filters.

Reinstalling the Siebel Handheld Application

Follow the steps below to reinstall your Siebel Handheld application.

To reinstall the Siebel Handheld application

- 1 Before you reinstall the current application, you must first uninstall the current application on your device. See [“Uninstalling the Siebel Handheld Application” on page 124](#) for more information.
- 2 Once you have uninstalled the application, you may then reinstall the application or install the newer version. See [“Installing the Siebel Handheld Application” on page 121](#), and follow the instructions for installing the Siebel Handheld application.
- 3 Synchronize your Siebel Handheld application. See [“Synchronizing Data on the Siebel Handheld Device” on page 135](#) and follow the instructions for synchronizing your data.

NOTE: If you are using Companion Sync to synchronize your data, synchronize the Siebel Handheld database with the Siebel Remote database.

Uninstalling the Siebel Handheld Application

Uninstalling the application deletes the database files as well as the application files.

CAUTION: Before you uninstall your application, you must synchronize your database to save any changes to your data since the last synchronization. If you do not synchronize before uninstalling, these changes will be lost. See [“Synchronizing Data on the Siebel Handheld Device” on page 135](#) and follow the instructions for synchronizing your data.

To uninstall the Siebel Handheld application

- 1 Select Start > Settings.
- 2 Select the System tab and tap Remove Programs.
- 3 From Remove Programs, select the Siebel Handheld application and tap Remove.

NOTE: A dialog box appears saying that a file cannot be deleted. This occurs because a file may still reside in memory. Ignore this message and tap OK to delete all application and database files. No additional steps are required to remove the application and database files.

9

Working with Siebel Handheld Applications

This chapter includes the following topics:

- [“Components of the Siebel Handheld Interface” on page 125](#)
- [“Navigating the Siebel Handheld Interface” on page 128](#)
- [“Navigating a List of Records in the Siebel Handheld Application” on page 128](#)
- [“Entering Data with the Siebel Handheld Application” on page 130](#)
- [“Finding and Querying Data in the Siebel Handheld Application” on page 130](#)
- [“Printing with the Siebel Handheld Application” on page 132](#)
- [“Exporting Data with the Siebel Handheld Application” on page 132](#)
- [“Setting User Preferences in the Siebel Handheld Application” on page 133](#)
- [“Backing Up and Restoring Data with the Siebel Handheld Client” on page 133](#)
- [“Synchronizing Data on the Siebel Handheld Device” on page 135](#)
- [“Synchronization Troubleshooting with the Siebel Handheld Client” on page 138](#)
- [“Improving Siebel Handheld Application Performance” on page 139](#)

Components of the Siebel Handheld Interface

The components of the handheld interface include the Screens menu, Show drop-down list, application-level menu, Queries drop-down list, toolbar, and status bar.

Figure 5 shows the components of the Siebel Handheld application.

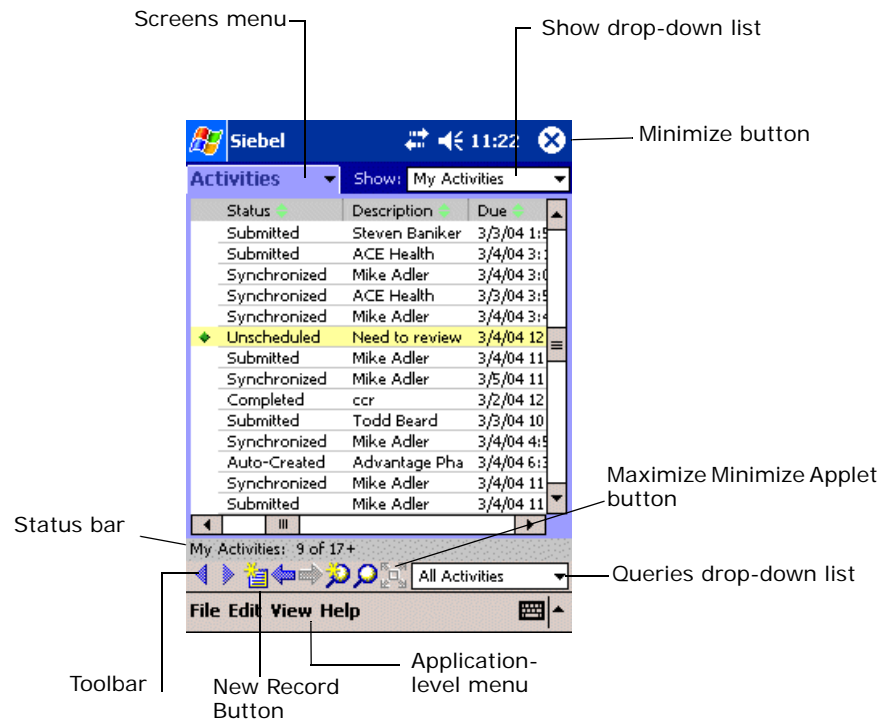


Figure 5. Siebel Handheld Screen Components

Screens Menu

The screens menu is the first level of navigation in the Siebel Handheld application. When you launch the Siebel Handheld application for the first time, this tab is labeled Screens unless you have configured a start up view to appear. When you tap the screens menu, a drop-down list of all available screens appears. Tap the desired screen in the list to navigate to it.

For information about configuring a start up view, see [“Setting User Preferences in the Siebel Handheld Application”](#) on page 133.

Show Drop-Down List

The Show drop-down list is the second level of navigation in the Siebel Handheld application. This is where you choose views for the selected screen.

Application-Level Menu

The application-level menu consists of the File, Edit, View, and Help menus. Tap a menu to select a menu option. The options that are available in each menu vary depending on the task you are performing.

Queries Drop-Down List

Up to two predefined queries, or business object filters are displayed in the Queries drop-down list. The list displays the query chosen when you synchronized (or the default filter if you did not change the Set Filters selection) and the All Records query, if it is defined. For more information, see [Chapter 5, "Data Filtering."](#)

Siebel Toolbar

The Siebel toolbar has buttons for frequently used functionality like record navigation and querying. You can configure your toolbar and specify which buttons are displayed. See ["Configuring User Interface Elements in Siebel Handheld" on page 25.](#)

- Tap the New Record button to add a new record to the active list or form.
- Tap the Back button to navigate to the previous view.
- Tap the Forward button to navigate to the view you were in before you selected the Back button.
- Tap the Record Navigation buttons to move through records in a form or a list.
- Tap the New Query button to begin a new query in a form or a list.
- Tap the Execute Query button to run the query you just created.
- Tap the Maximize Minimize Applet button to expand the active applet so that it is the only applet displayed and takes up the entire screen display. This allows you to see more columns or more rows of data at one time. Tap again and the screen displays two applets.

Customizing the Toolbar

You can customize which buttons appear on your toolbar by selecting View > Customize Toolbar from the application menu.

To add and remove buttons from the toolbar, drag and drop the desired buttons between the Choose Toolbar Buttons dialog box and the toolbar.

Minimize Button

The Minimize button appears in the upper-right corner of your window. When you tap the Minimize button, the application minimizes, but does not close. To reopen the minimized application, from the Start menu, tap the Siebel Handheld icon. To close (exit) the application, choose File > Exit.

Do not confuse the Minimize button that appears in the upper right corner with the Maximize Minimize Applet button that appears on the Toolbar.

Status Bar

The status bar appears at the bottom of the application window. It provides information about the current view.

Navigating the Siebel Handheld Interface

Navigating the Siebel Handheld application is achieved through the screens menu, the Show drop-down list, drilling down, drilling across, toolbar buttons, and toggling.

Screens Menu

The screens menu provides the first level of navigation. Here you select the screen you want to work in. For more information about the screens menu, see [“Components of the Siebel Handheld Interface” on page 125](#).

Show Drop-Down List

The Show drop-down list is the second level of navigation. After you have selected a screen from the screens menu, select a view from the Show drop-down list. Views in the Show drop-down list are specific to each screen.

For example, in the Activities screen you can pick the My Activities view from the Show drop-down list.

Expandable Fields

Due to the limited screen size on the handheld, it is not always easy to view the data in a field without scrolling or resizing the field width. Therefore, some fields that could contain large amounts of text are expandable—that is, the data can be viewed in a text box. An ellipsis (...) appears in the field to indicate that the field is expandable. When you tap the ellipsis, a text box opens showing the data in that field. When you step off the field, the text box closes.

In form applets, an ellipsis is always visible in those fields that are expandable. However, in list applets, due to space constraints, the ellipsis is not always visible in expandable fields. When you tap on an expandable field in a list applet, the ellipsis appears. Once the ellipsis appears, you tap the ellipsis to open the text box.

URLs in Applet Fields

Tapping on a field that contains a URL value launches the URL in PocketIE.

Navigating a List of Records in the Siebel Handheld Application

Within the view you select from the Show drop-down list, you can view detailed information on a record. When records are displayed in a list, you can drill down or drill across the record to get additional details.

Drilling down occurs when you tap a hyperlink in a record and are taken to another view within the current screen. For example, if you are in the Accounts screen, and tap the Account Name hyperlink, you navigate to the details for that account. You do not leave the Accounts screen; you just move deeper into it.

NOTE: Hyperlinks are indicated by blue underlined text as long as they are set up this way in User Preferences. For more information see [“Setting User Preferences in the Siebel Handheld Application” on page 133.](#)

Drilling across a record occurs when you tap a hyperlink in a record and are taken to another view in a different screen. For example, tapping a hyperlink in the Accounts column of a contact record in the Contacts screen takes you to the record for that account in the Accounts screen.

Dynamic drilldown occurs when you tap a hyperlink in a record and are taken to another screen or just another view. Where you navigate to depends on the content in the drilldown field. For example, tapping a hyperlink in the Activity field in the Activities screen can take you to different places. If you tap an Account Call activity, you navigate to the Account Call screen. If you tap a Visit activity, you navigate to the Activities More Info view.

History Arrows




To navigate back to views you have recently displayed, tap the Back button. After you have used the Back button, you can use the Forward button to navigate back to your original screen and view.

NOTE: The History arrows only allow you to navigate between views. These arrows do not allow you to recover data that may have been entered or deleted in another view.

Record Navigation Buttons

Use the Record Navigation buttons to move back and forth through a set of records. The navigation buttons are described in [Table 34.](#)

Table 34. Record Navigation Buttons

Button	Description
	Navigates back to the previous record in the list or form.
	Navigates forward to the next record in the list or form.
	Navigates back a view based on the navigation history. You can define which views are part of the history. If a view is set to not be recorded as part of the history, the back button won't go back to that view.

Entering Data with the Siebel Handheld Application

There are several different methods for entering data in the Siebel Handheld application. Tap the up arrow next to the Input Panel button to select a method. See the user guide for your device for information on using the different input methods.

Working with Columns in the Handheld Client

Data is displayed in lists and forms in your Siebel Handheld application. You can organize and work within it in a number of ways to better suit your needs.

There are several ways in which to organize columns in a list. You can:

- Sort data by up to three columns
- Resize columns
- Change the order in which the columns appear
- Show and hide columns
- Lock columns for horizontal scrolling

You can sort records in a list by tapping in the column header of the column in which you want to sort the records. If the green column sort indicator points up, the column is sorted in ascending order. If it points down, the column is sorted in descending order.

If you need to sort by more than one column, you can open the Sort Order dialog box to sort up to three columns at one time. Open the Sort Order dialog box by choosing View > Advanced Sort from the application-level menu.

Resize columns by tapping and dragging the divider between the column headings until the column is the desired size.

You can change the order of columns using the Columns Displayed dialog box. Open the Columns Displayed dialog box by choosing View > Columns Displayed.

Show and hide columns using the Columns Displayed dialog box. In the Available columns list, select the items you want to show and tap the arrow to move the selected items to the Selected columns list. To hide columns, select the items and tap the arrow to move the selected items to the Available columns list.

Lock or unlock columns by tapping and holding the column header.

Finding and Querying Data in the Siebel Handheld Application

You can search for data using the Find or Query functionality in your Siebel Handheld application.

About Find in Handheld

Use Find to do a simple search for a record. You can access Find by choosing Edit > Find View > Find from the application-level menu. This launches the Find dialog box, in which you can enter your search criteria. The asterisk wildcard function (*) can be used in the search criteria. Figure 6 shows an example of the Find dialog window with the following fields: Look In, Last Name, Type, Last Call Date, Primary Specialty, and Rep Specialty.

NOTE: There may be a slight variation in your version of Siebel software, and the Find dialog box may not look exactly as shown here.

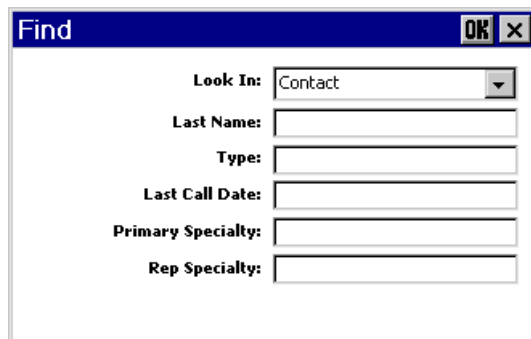


Figure 6. Find Dialog Box

About Queries in Handheld

Use Query to locate a number of records containing a specific set of criteria. There are a number of ways in which to perform query tasks in your Siebel Handheld application.

Creating a Query

To begin a query, you can choose Edit > Query > New from the application-level menu, or you can tap the New Query button on the toolbar. Both provide you with a blank form or list where you can enter your query criteria, depending on where you are in the application when you invoke the command. The asterisk wild card function (*) can be used in the search criteria.

Executing a Query

After you have created the query, you can execute it by choosing Edit > Query > Run from the application-level menu or by tapping the Execute Query button in the toolbar.

Refining a Query

You can refine your current query by choosing Edit > Query > Refine from the application-level menu.

Printing with the Siebel Handheld Application

You may print from any view in the Siebel Handheld application that has been configured to support printing. When you print from the handheld, a document that has been configured for the view is printed. You can print directly to a printer, or, if you are not connected to a printer at the time, you can queue your print jobs and wait until you have access to a printer to print your documents.

NOTE: When you print from a view, you are not necessarily printing what is visible on the screen at the time. Every field on the screen may not be relevant for the document. The document may contain only a portion of what is in the view, and it may also contain data that is not viewable at the time. A separate applet, which often cannot be viewed in the user interface, is configured specifically for printing.

The print templates used to generate the printed are installed during the time of setup.

For a list of supported printers, see *System Requirements and Supported Platforms* on Siebel SupportWeb.

Print from the Siebel Handheld application by choosing File > Print. If you are connected to a printer, the print job runs. If you are not connected to a printer, the print job is sent to a print queue. View the print queue by choosing File > Print Queue.

Exporting Data with the Siebel Handheld Application

You may export data from any view in your application in HTML format or as tab delimited text and save it to a file. This file can be viewed in applications such as Microsoft Pocket Word, Microsoft Pocket Excel, and Internet Explorer.

To export data, select File > Export to open the Export dialog box.

In the Export dialog box, you may specify the following:

- **Format.** Specify either HTML or Tab delimited text file.
- **Export.** Select Only active applet to export only the data in the active applet. Select All applets in view to export the data in all visible applets.
- **Output file name.** By default, the file is saved in the temp directory with the filename "output." You may tap Browse to specify a different location or filename.
- **Paste Output to Clipboard.** Select the checkbox to save the data to the clipboard.

- **Open file.** Select the checkbox to automatically open the file. When you tap OK in the Export dialog box, the data is exported to the specified file, and the file is automatically opened.

NOTE: You must specify a valid output format for the application. See Table 35 for the correct formats to specify for the supported applications.

Table 35. Export Data Options

To export data to	Do the following
Microsoft Word	Set Format to "Tab delimited text file."
Microsoft Excel	Select the "And paste output to clipboard" check box. The Output format may be set either to HTML or "Tab delimited text file." Paste the data from the clipboard into an Excel spreadsheet.
Microsoft Internet Explorer	Set Format to HTML.

Setting User Preferences in the Siebel Handheld Application

You can customize aspects of your Siebel Handheld application from the User Preferences dialog box. Access the User Preferences dialog box by choosing View > User Preferences from the application-level menu.

In the User Preferences dialog box you can:

- Set a default startup screen.
- Set number of maximum history threads to be saved.
- Set the maximum percentage of the display area that the parent applet can take up.
- Change font size.
- Customize list spacing, column width settings, and grid lines.
- Customize your calendar's default view, start time, time slot interval, and default appointment duration.

Backing Up and Restoring Data with the Siebel Handheld Client

It is recommended that you back up your data to an external device—for example, a CompactFlash card or a Secure ID card. If the handheld device is damaged, the backup may not be retrievable. If you store your backups in RAM, depending on the size of your application and data extract, you may decrease the amount of memory available for the application, and your application performance may suffer.

Automatic Backup After Synchronization

The automatic backup feature must be enabled in the application by your System Administrator. If the backup feature is enabled, a backup is automatically created at the end of every synchronization. This way, you have an up-to-date snapshot of the database.

CAUTION: You must never synchronize your data to the handheld device and then restore the database using an older copy of the database. If you do, the next time you synchronize, the application tries to rewrite changed transactions. This can cause data integrity problems. Therefore, when the database backup feature is enabled, a database backup occurs automatically at the end of each synchronization.

Keep in mind that enabling automatic backup makes the overall time to synchronize somewhat longer. The size of the database and the speed of the CompactFlash card also affect the time it takes to complete synchronization.

For more information, see [“Enabling Handheld User Database Backup”](#) on page 105.

Backing Up Data

The following procedure describes how to back up the database on the handheld device.

To back up the database

- 1 From the application-level menu, choose File > Backup.

NOTE: If the Backup menu item is disabled, contact your system administrator to have backup enabled in your application.

A dialog box appears, telling you that backing up the data will restart the application and prompts you to confirm that you want to continue.

- 2 Tap Yes to start the backup.

A status dialog box appears indicating that the backup is in progress and may take a few minutes. The Handheld configuration files and data is copied to the backup location specified in the setup.ini file. Typically, the backup location is a CF or SD card.

A dialog box appears telling you whether the backup succeeded and asks if you want to return to the application.

- 3 Tap Yes to return to the application.

NOTE: If the backup fails, consult your system administrator.

Restoring Data from a Backup

In order to restore the application to its previous state, the user should contact the system administrator. Any work performed on the handheld device since the last backup will be lost.

To restore the database

- 1 Remove the external flash card from the damaged device and place it in a new handheld device where the application has been installed.
- 2 Navigate to the \Program Files\Siebel Handheld folder.
- 3 Start the restore by tapping the BackupUtility file twice.
A dialog box appears, asking you to confirm that you want to restore the device from a previous backup.
- 4 Tap Yes.
A status dialog box appears, indicating that the restore is in progress. The backup utility restores the files to the state when the backup was performed. A dialog box appears telling you if the restore was successful. If successful, it asks you to confirm that you want to restart the Siebel Handheld application.
- 5 Tap Yes to start using the application.

Synchronizing Data on the Siebel Handheld Device

You must synchronize the data on your handheld device:

- After you install or upgrade the Siebel Handheld application.
- Before uninstalling the Siebel Handheld application.
- On a regular basis to keep your data synchronized with Siebel Server and Siebel Mobile Web Client.

The sections that follow describe how to synchronize using Companion Sync (CS), Direct Server Sync (DSS) and Direct Server Sync via Proxy (DSSvP), and provide some troubleshooting tips.

Using Siebel Handheld Synchronization with the Handheld Client

Siebel Handheld Synchronization differs depending on whether users synchronize through Companion Sync or Direct Server Sync. The following topics show you how to launch and use Handheld Synchronization for each method.

NOTE: A given user can only synchronize using one method. For example, it is not possible to install a Siebel Handheld application that a particular user will synchronize both to the Siebel Mobile Web client database through Companion Sync and also to the Siebel Server database directly through Direct Server Sync.

Using Companion Synchronization with the Handheld Client

If you are using Companion Sync, you must follow a three-step process to synchronize handheld, remote, and server databases. Immediately before and after every Siebel Remote sync, you must perform a Companion Sync. This process can be time consuming for the end user and difficult for the administrator to enforce.

Integrated Sync eliminates the need for you to initiate three separate sync sessions for each Siebel Remote sync.

Before using Integrated Sync, you must specify or add the parameter RemoteCfgName in the [pda] section of phce.cfg for the CFG file that will be used to invoke Siebel Remote Sync. For example, RemoteCfgName=epharma.cfg. If you do not specify this parameter it will default to siebel.cfg. This parameter is used by Siebel Handheld Sync to invoke Siebel Remote. It applies only when synchronizing using the Integrated Sync option.

Integrated Sync automatically initiates each of the following synchronization steps:

- 1 Handheld Upload and Processing - Handheld transactions are uploaded to the companion PC and processed.
- 2 Siebel Remote Synchronization - The Siebel Mobile Client is synchronized with the Siebel server. Transactions on the mobile client database are uploaded to the Siebel server, and changes to the Siebel server are downloaded to the mobile client database.

CAUTION: If there is a handheld patch staged on the server, synchronization terminates and the patch is installed. After the patch installation is completed, you are prompted to synchronize again (using either Integrated Sync or Companion Sync) to complete the data extraction and download (that is, move to Step 3). It is critical that you synchronize a second time after the patch installation is completed. If you fail to do so, you will not be able to start the Siebel Handheld application.

- 3 Handheld Data Extract and Download - Data is extracted from the mobile client database to the handheld device database.

You may use Companion Sync to synchronize your handheld with Siebel Mobile Client as many times as you wish between Integrated Sync sessions. However, it is recommended that you conduct Integrated Sync sessions frequently so that the Siebel Remote synchronization process does not take long periods of time to complete and update conflicts are minimized.

To perform Companion Sync from the PC

- 1 From the companion PC, establish a Microsoft ActiveSync connection to the handheld device.
- 2 From the companion PC, choose Start > Programs > Siebel Handheld Sync.

The Siebel Handheld Sync dialog box appears.

- a Enter your name and password.

- b Select the Perform Remote Sync check box to perform an Integrated Sync.

If you want to do Companion Sync only, then unselect the Perform Remote Sync check box.

Selected Bypass Set Filters skips the step of selecting the filters and immediately starts the synchronization process. If you select Bypass Set Filters, then the filters that you selected the last time you synchronized are used. If this is the first time you are synchronize, then the default filters are used.

- 3 Tap Start.

NOTE: Tap Default Filters to restore the filter selection to the default setting.

- 4 Tap OK and tap Start to begin synchronization.

- a The Siebel Handheld Sync dialog box appears. If "Perform Remote Sync" was selected, this is followed by the Siebel Remote dialog box. When synchronization has successfully completed, the Finished dialog box appears.

- b If a handheld patch needs to be installed, the synchronization process is interrupted and the patch is installed. After the patch is installed, you must restart Siebel Handheld Sync to complete the data extract process. If you fail to do so, you cannot start your application.

- c The Finished dialog box appears indicated that the synchronization has successfully completed.

- 5 Tap OK to exit Siebel Handheld Sync.

NOTE: If synchronization errors occur, an error dialog box appears.

Companion Sync can also be performed in the method described for Direct Server Sync via Proxy in "Using Direct Server Synchronization with the Handheld Client" on page 137.

To perform Companion Sync from the handheld device

- 1 From the application-level menu, choose File->Synchronization.

- 2 In the Sync window select the "Enable Remote Sync" checkbox. It is disabled by default.

For information on changing the parameter value for EnableRemote in the setup.ini file, see "Siebel Handheld setup.ini Parameters" on page 103.

- 3 See the steps for synchronizing using DSSvP in the procedure "To synchronize with the Siebel application server" on page 138.

Using Direct Server Synchronization with the Handheld Client

There are two methods for synchronizing between the handheld device and the Siebel application server:

- Direct Server Sync (DSS) provides synchronization between the Siebel Handheld application and the Siebel application server.

- Direct Server Sync via Proxy (DSSvP) provides synchronization between the Siebel Handheld application and the Siebel application server, using the desktop or companion PC to provide the network connection between the handheld device and the server.

To synchronize with the Siebel application server

- 1 If you are synchronizing using DSS, create a direct network connection through a modem or a direct LAN connection.

If you are synchronizing using DSSvP, establish an ActiveSync connection between the handheld device and the PC.
- 2 From the application tap File > Synchronize.

The Siebel Handheld Sync dialog box appears.
- 3 Enter your user name and password.
- 4 Tap Start.

The Siebel Handheld Sync dialog box appears.
- 5 Tap OK to exit Siebel Handheld Sync, and the application will launch automatically.

NOTE: If synchronization errors occur, an error dialog box appears.

Synchronization Troubleshooting with the Siebel Handheld Client

This section lists potential error messages that are associated with synchronization. In addition, this section helps to understand transaction errors.

General Synchronization Errors

There are a number of different errors that can occur when synchronization does not complete successfully, for example:

- Faulty wire connection
- Server crash
- Insufficient memory
- Login error

When these errors occur, the user should exit Siebel Handheld Sync and launch the application again.

NOTE: When you restart Siebel Handheld Sync, you may see an error message that says that another instance of syncmanager.exe is running. You are asked whether you want to terminate the first instance or not, and you should choose Yes.

Transaction Conflicts

Transaction conflicts are minimized when customers adhere to the standard configuration practices outlined in this document. However, even when proper configuration practices are followed, conflicts can occur for a variety of reasons. For example, if a field value is updated on both the handheld client and the server between synchronization events, a transaction update conflict occurs. In this instance, the user is presented with an error dialog after synchronization has completed.

A transaction consists of one or more smaller transactions called mini-transactions. For example, if you update several fields in a record, the update to the record counts as a single transaction, and each update to a field is a mini-transaction. Individual fields are skipped when update conflicts occur. Changes to any field that has been updated on the server since the last sync (perhaps by another Handheld user) are discarded (but logged and returned as errors to the user). All non-conflicting fields normally are updated. Except for field-level conflicts, which are skipped when they occur, a transaction is applied in its entirety, and at this point will either succeed or fail in its entirety.

Improving Siebel Handheld Application Performance

If you find that the performance of the Siebel Handheld application is very slow or begins to degrade, the following can help to improve the application performance:

- Verify that you are using a Siebel supported device for your application. See *System Requirements and Supported Platforms* on Siebel SupportWeb.
- When you run the Siebel Handheld application, it is recommended that you do not run any other applications. By doing so, you maximize the amount of memory that is available to run the application.
- Increase the amount of memory that is allocated for running applications.
- Installing the binaries to a CompactFlash card. For more information, see [“Setting Up Siebel Handheld Application Installation on a CompactFlash Card” on page 107](#).

To increase application memory

- 1 From the Start menu, select Settings.
- 2 Select the System tab and tap Memory.
- 3 Move the slider bar so that more memory is allocated to Program Memory, then tap OK.

10 Using Pharma Handheld

This chapter includes the following topics:

- [“Managing Contacts with Siebel Pharma Handheld” on page 141](#)
- [“Managing Accounts with Siebel Pharma Handheld” on page 146](#)
- [“Planning and Recording Calls in Siebel Pharma Handheld” on page 151](#)
- [“Creating General Activities in Siebel Pharma Handheld” on page 166](#)
- [“Managing Samples in Siebel Pharma Handheld” on page 169](#)
- [“Setting Up MedEd Events in Siebel Pharma Handheld” on page 180](#)
- [“Creating Expense Reports in Siebel Pharma Handheld” on page 182](#)

Managing Contacts with Siebel Pharma Handheld

A *contact* is typically a physician, nurse, pharmacist or other medical professional. In a more general sense, a contact is any individual a pharmaceutical company deems significant to their business process, such as a formulary director, contracts administrator, or medical education event speaker.

Sales representatives use Pharma Handheld to add and update contact profile information which may include adding new contacts, creating new contact addresses, tracking affiliations between contacts and accounts, recording the best times to call on a contact, transcribing relevant notes, and viewing prescription data.

This section describes how to manage contact information using all of the views accessible from the Contacts screen’s Show drop-down list, except for Calls and Activities. The following contact management procedures are included in this section:

- [“Adding Contacts in Pharma Handheld” on page 142](#)
- [“Adding Contact Addresses in Pharma Handheld” on page 143](#)
- [“Adding and Editing License Information in Pharma Handheld” on page 143](#)
- [“Specifying the Best Time to Call on a Contact in Pharma Handheld” on page 144](#)
- [“Adding Private or Shared Notes About a Contact in Pharma Handheld” on page 145](#)
- [“Indicating Affiliations Between Contacts and Accounts in Pharma Handheld” on page 145](#)
- [“Viewing Prescription Data in Pharma Handheld” on page 146](#)

For information on the Calls and Activities views, see [“Creating Contact Calls in Pharma Handheld” on page 155](#) or [“Creating General Activities in Siebel Pharma Handheld” on page 166](#).

Adding Contacts in Pharma Handheld

Using the Contacts screen and the My Contacts view, you can add contacts and update contact information directly in Pharma Handheld.

To add contacts

- 1 Navigate to the Contacts screen.
The My Contacts list appears.
- 2 On the toolbar, tap the New Record icon.
- 3 Complete the Last Name, First Name, Main Phone, Type, and Title fields for the new record.

To add additional contact information

- 1 Navigate to the Contacts screen
The My Contacts list appears.
- 2 Select a record, and from the Show drop-down list, choose More Info.
- 3 Add or edit information in the available fields.

The fields are described in the following table.

Field	Comments
Address	Read only. A contact can have more than one address. One address must be specified as primary. Addresses are entered using the Addresses view. For more information on adding addresses, see “Adding Contact Addresses in Pharma Handheld” on page 143 .
Last Call Date	Read only. The date of the most recent call that has been submitted.
OK to Sample	Checking this box indicates that it is permissible to drop samples off with this contact.
Primary Specialty	Read-only. Siebel administrators define this value.
Rep Specialty	The specialty or area of expertise associated with this contact within the contact’s organization.
Route	Allows users to select when to visit an account from a predefined route schedule.
Title	Must be filled in before a contact can sign for receipt of samples.
Type	Indicates the type of contact.

Adding Contact Addresses in Pharma Handheld

Contact addresses are entered in the Addresses view. Since a contact can have multiple addresses, and multiple contacts may share an address, take care when editing an address as the changes may affect more than one contact.

When entering addresses, specify one address as the primary. Each sales representative can specify a different primary address for an assigned contact. For example, one representative might specify a private office as the primary address, while another representative might designate a hospital department as the primary address.

The More Info form only displays the primary address, not all the addresses associated with the contact.

To add contact addresses

- 1 Navigate to the Contacts screen
The My Contacts list appears.
- 2 Select a record, and from the Show drop-down list, select Addresses.
- 3 Tap the list of addresses to select it.
- 4 On the toolbar tap the New Record icon.
- 5 In the Addresses list, do one of the following:
 - Tap New to add a record, and then complete the necessary fields.
 - Tap an existing address in the list, and then tap OK.
- 6 In the Address list, tap the check box in the record's Primary field to designate the record as the contact's primary address.
A check mark appears in the box to designate the primary address.

Adding and Editing License Information in Pharma Handheld

Using the License Numbers view, you can add the contact's professional license number, such as a state medical license number or a physician investigator's AMA number.

Before a physician can sign for samples dropped, you must enter the physician's license numbers and additional license information. The contact must have a valid license number for the state corresponding to the address where samples are disbursed.

To add and edit license information

- 1 Navigate to the Contacts screen
The My Contacts list appears.

- 2 Select a contact, and from the Show drop-down list, select License Numbers.
The License Numbers view appears.
- 3 Tap the License Numbers list to select it, and then do one of the following:
 - On the toolbar, tap the New Record button, and then complete the fields for State, License number, License Expiration Date, and license Status.
 - Tap a License Number record to select it, and then edit the information in the fields.

Specifying the Best Time to Call on a Contact in Pharma Handheld

Using the Best Time to Call view, you can enter the best times to call on a contact based on a selected address. You can then query for contacts available during a specific time period.

To specify the best times to call on contacts

- 1 Navigate to the Contacts screen.
The My Contacts list appears.
- 2 Select a contact, and from the Show drop-down list, select Best Times to Call.
- 3 Tap the Best Times to Call list to select it.
- 4 On the toolbar, tap the New Record button.
- 5 Complete the fields for the new record, as described in the following table.

Field	Comments
Address	Indicates which contact address pertains to this best time to call information. Select the address from the Pick Location dialog box, and tap OK. The Pick Location dialog box displays all addresses associated with that contact.
Start Day	Indicates the day that the contact is available for a call at that address.
Start Time	Indicates the start time for the selected day that the contact is available for a call.
End Time	Indicates the end time for contact availability.
Comments	Text field for information about time period constraints and other relevant notes.

Adding Private or Shared Notes About a Contact in Pharma Handheld

Using the Private Notes and Shared Notes views you can create and update notes on contacts. Private notes are visible only to the creator of the note; shared notes are available to other sales representatives calling on the contact.

To add notes about contacts

- 1 Navigate to the Contacts screen, and select a contact from the My Contacts list.
- 2 From the Show drop-down list, select one of the following:
 - **Private Notes.** Limits access to the note to the person creating it.
 - **Shared Notes.** Allows all account team members to access the note.
- 3 Tap the Private Notes or Shared Notes list to select it.
- 4 On the toolbar, tap the New Record button.
A new row appears in the list.
- 5 Complete the necessary fields for the record.
Tap in the Note field, and then tap the ellipsis (...) to view the entire note while you are entering text.

Indicating Affiliations Between Contacts and Accounts in Pharma Handheld

Using the Affiliations view, you can associate a contact with an account. One reason to establish these affiliations is for call reporting purposes. Affiliations between accounts and contacts also can be established using the Accounts screen.

To specify affiliations between contacts and accounts

- 1 Navigate to the Contacts screen, and select a contact from the My Contacts list.
- 2 From the Show drop-down list, select Affiliations.
The Account Affiliations view appears.
- 3 Tap the Account Affiliations list to select it, and then tap the New Record button.

4 Complete the necessary fields for the new record.

Some of the fields are automatically populated based on the chosen Account. Other fields are described in the following table.

Field	Comments
Account	The account to be affiliated with the selected contact. Select a predefined account from the Pick Account list, and then tap OK.
Comments	Text field for user comments.
Direct	<p>If a check mark appears in this field, profile data for the contact is routed to members of the team assigned to the affiliated account.</p> <p>If no check mark appears in this field, the profile data is routed only to the members of the team assigned to the contact. Tap the check box to specify a direct affiliation between a contact and an account.</p>
Primary	If a check mark appears in this field, the account is the primary affiliation for the contact. Tap the check box to display a check mark.
Start Date	The beginning date on which the contact became affiliated with this account.

Viewing Prescription Data in Pharma Handheld

Using the Rx Data view, you can view prescription data to better target medical professionals. Data about physicians and prescribed drugs helps pharmaceutical companies define their market for better strategic business planning and national account management. Prescription data can be analyzed to measure market potential, target customers, align sales territories, and track market shifts.

To view prescription data

- 1 Navigate to the Contacts screen, and select a contact from the My Contacts list.
- 2 From the Show drop-down list, select Rx Data.
The Rx data associated with the contact appears in the RX Data list.
- 3 In the list, review the prescription data on a market-by-market basis.

Managing Accounts with Siebel Pharma Handheld

An *account* is any health care business that generates sales for your company or that could potentially generate business. Typical examples of accounts include hospitals, clinics, HMOs, wholesalers, group purchasing organizations (GPOs), and pharmacies. An account can also be any organization with which multiple contacts are associated, such as a group practice or an assisted-living facility.

Sales representatives in the field use Pharma Handheld to add and update account profile information. Representatives use Pharma Handheld to add new accounts, create new account addresses, record the best times to call on an account, and record relevant notes. Sales representatives can also view sales data on Pharma Handheld to help them evaluate the business potential of accounts.

This section describes how to manage account information using all of the Accounts views accessible from the Show drop-down list, except the Calls and Activities views. For information on those views, see [“Creating Account Calls in Pharma Handheld” on page 162](#) or [“Creating General Activities in Siebel Pharma Handheld” on page 166](#).

The following account management procedures are included in this section:

- [Adding Accounts in Pharma Handheld on page 147](#)
- [Adding Account Addresses in Pharma Handheld on page 148](#)
- [Specifying Best Times to Call Accounts in Pharma Handheld on page 148](#)
- [Adding Notes About Accounts on page 149](#)
- [Indicating Affiliations Between Accounts and Professionals in Pharma Handheld on page 149](#)
- [Viewing Sales Data in Pharma Handheld on page 150](#)

Adding Accounts in Pharma Handheld

Accounts are businesses and organizations that either currently generate sales for your company or have the potential to do so. You can add or edit accounts using the My Accounts view.

NOTE: Only a Siebel administrator can delete an account.

To add an account

- 1 Navigate to the Accounts screen.
The My Accounts list appears.
- 2 On the toolbar, tap the New Record button, then complete the necessary fields for the new record.
- 3 To enter information in additional fields, select More Info from the Show drop-down list.

Some of the fields are described in the following table.

Field	Comments
Account	Account name. Tapping the account name hyperlink opens the Call Activities view.
Address	The account can have more than one address. One address must be specified as primary. Account addresses must be entered in the Addresses view. For more information on adding addresses, see “Adding Account Addresses in Pharma Handheld” on page 148 .

Field	Comments
Site	A unique location identifier that distinguishes this account from any other accounts with the same name.
Mkt Potential	Used to evaluate the business potential of the account.

Adding Account Addresses in Pharma Handheld

Addresses for accounts are entered in the Addresses view. Since an account can have multiple addresses, care should be taken when editing an account address, as changes affect all accounts associated with the address.

When entering account addresses, designate one address as the primary. Each sales representative assigned to an account can specify a different primary address. For example, one representative might specify a private office as the primary address, while another representative might specify a hospital department as the primary address.

The More Info form displays the primary address, not all the addresses for the contact.

To add account addresses

- 1 Navigate to the Accounts screen.
The My Accounts list appears.
- 2 Select a record, and from the Show drop-down list, select Addresses
- 3 Tap the Addresses list to select it, then on the toolbar, tap the New Record button.
- 4 In the Add Address dialog box, do one of the following:
 - Tap New to create a new address record, and then complete the fields.
 - Select an existing address from the list, and then tap OK.
- 5 In the Primary field, tap the check box to display a check mark if this is the account's primary address.

Specifying Best Times to Call Accounts in Pharma Handheld

Use the Best Times to Call view to specify appropriate time periods for account calls.

To specify best times to call accounts

- 1 Navigate to the Accounts screen.
The My Accounts list appears.

- 2 Select an account, then from the Show drop-down list, select Best Times to Call.
- 3 On the toolbar, tap the New Record button.
- 4 Complete the necessary fields for the new record.

The fields are described in the following table.

Field	Comments
Start Day	Indicates the days that the contact is available for a call.
Start Time	Indicates the time that the contact is available for a call.
End time	Indicates end of available time period.
Comments	Text field for schedule information.

Adding Notes About Accounts

Using the Private Notes and Shared Notes views, you can create and update private and shared account notes. Private notes are visible only to the note creator; shared notes are available to other sales representatives calling on the account.

To add account notes

- 1 Navigate to the Accounts screen.
The My Accounts list appears.
- 2 Select an account from the My Accounts list.
- 3 From the Show drop-down list, select one of the following:
 - **Private Notes.** Limits access to the note to the person creating it.
 - **Shared Notes.** Allows all account team members to access the note.
- 4 Tap the Notes list to select it.
- 5 On the toolbar, tap the New Record button, then complete the fields for the new record.
Tap in the Note field, and then tap the ellipsis (...) to view the entire note while you are entering text.

Indicating Affiliations Between Accounts and Professionals in Pharma Handheld

For accounts where you have contact with multiple professionals, you can indicate the affiliation of those professionals with the account by using the Affiliations view. Creating affiliations between accounts and contacts promotes efficiency in call reporting.

To indicate affiliations between accounts and contacts

- 1** Navigate to the Accounts screen
The My Accounts list appears.
- 2** Select an account from the My Accounts list, and from the Show drop-down list, select Affiliations.
- 3** Tap the Contact Affiliations list to select it.
- 4** On the toolbar, tap the New Record button.
- 5** Complete the necessary fields for the new record.
Some of the fields are described in the following table.

Field	Comments
Last Name	The contact affiliated with this account. Tap the field, select the contact from the Pick Contact list, and then tap OK.
Start Date	The beginning date on which the account became affiliated with this contact.
Direct	Tap the check box to display a check mark. If a check mark appears in this field, profile data for that person is routed to all members of the team assigned to the affiliated account. If no check mark appears in this field, the profile data is routed only to members of the team assigned to the person.

Viewing Sales Data in Pharma Handheld

Sales data can be analyzed to measure market potential, target customers, align sales territories, and track market shifts. Sales data is typically syndicated information that is loaded periodically by the Siebel administrator.

You can review this information using the Sales Data view.

To view sales data

- 1** Navigate to the Accounts screen.
The My Accounts screen appears.
- 2** Select an account from the My Accounts list, and from the Show drop-down list, select Sales Data.
- 3** Review the data in the list on a product-by-product basis.

Planning and Recording Calls in Siebel Pharma Handheld

Planning calls in Pharma Handheld consists of configuring personal lists and creating account and contact calls. Recording calls involves entering information on products detailed, samples and promotional items dropped, and decision issues that occurred during the call.

About Personal Lists

Personal lists allow for faster call reporting by limiting the number of products that appear in drop-down lists in the Call Products Detailed, Samples Dropped, and Promotional Items Dropped views.

About Contact and Account Calls

Contact and account calls are types of activity records, although contact and account calls cannot be created from the Activities view.

Contact calls can be created by tapping the New Call or Auto Call button from the My Contacts view, by creating a new record from the Contacts screen's Calls view, or by creating a new record from the Contact Calls screen.

Account calls can be created by tapping the New Call or Auto Call button from the Accounts screen, by creating a new record from the Accounts screen's Calls view, or by creating a new record from the Account Call screen.

- **Contact call.** Used to track a planned or past call activity with a contact. You can record details about contact calls such as the products detailed, the samples and promotional items dropped, and decision issues discussed. Before you can record details about a contact call, you must set up personal lists.
- **Account call.** Used to track a planned or past call activity at an account. You can record products detailed, attendees, promotional items dropped, and decision issues discussed.

About Auto Call, Smart Call, and Auto Update

Pharma Handheld provides several features to manage contact and account call records:

- **Smart Call.** Specifying a Smart Call template for the call record associates a prepopulated call template with this call.

A Smart Call is a template that you can apply to contact calls and account calls to simplify and speed up the call-reporting process. A Smart Call defines a set of information about the products detailed, the samples distributed, and the issues discussed on a call. Smart Call templates are created in Siebel Pharma, not in the handheld application.

Smart Calls can be also used for calls related to a particular campaign or promotional effort, or for everyday call reporting. They are intended for situations where sales representatives report details about a number of calls that are identical in content (the same products are detailed in the same order, the same samples are dropped, and so on). After you apply a Smart Call template to a call, you can make additional edits in any fields in the Contact Call screen's Details view.

- **Auto Call.** Selecting the Auto Call button creates a new call and populates the record with items from the personal lists.

Auto Call is designed to help minimize the time in front of a physician by pre-populating the call with products from your personal list. Apply Auto Call as a part of the call planning process. Once the call has been created, you can access auto-created calls to record call information directly on the handheld in front of a physician.

Auto Call speeds up call reporting because you do not have to individually select the products and samples while recording the call. After selecting Auto Call, the Status field in the Contacts view displays Auto-Created.

- **Auto Update.** Selecting Auto Update deletes from the database unused auto-created call records.

Business Scenarios for Calls and Lists in Pharma Handheld

The following scenarios depict typical work sequences followed by sales managers and representatives using Siebel Pharma and Pharma Handheld. Your company may follow a different sequence according to its business requirements.

Scenario for Setting Up Personal Lists

A sales representative has recently joined a pharmaceutical company that uses Pharma Handheld in the field. During her sales training, the representative's sales manager tells her that before she can record calls within the system, she must first set up her personal lists. The sales manager explains that personal lists allow faster call reporting by limiting the number of products that appear in the application's drop-down lists. The sales manager then demonstrates how to add products to the sales representative's Details, Samples Dropped, and Promotional Items views. Following her manager's instruction, the sales representative updates her personal lists and is ready to record call details.

Scenario for Planning Calls in Siebel Pharma and Recording Calls in Siebel Pharma Handheld

A sales representative for a pharmaceutical company wants to set up visits to her customers over the next few days. To do so, she first uses Siebel Pharma on her laptop to plan contact calls. Then she synchronizes the data with Siebel Pharma Handheld on her handheld device, which she carries with her to record call details.

To plan her calls, she begins by analyzing the physicians' prescribing habits. She then queries on geographical location, specialties, and time lapse since she last called on them to determine which physicians she should call on.

Using Siebel Pharma, she applies a Smart Call template to those calls so that information about the samples products is automatically copied into the call records. She has now prepopulated the calls with the details that she wants to speak about with each physician as well as the samples she wants to drop off.

The sales representative synchronizes her handheld so that she can carry these details with her and record her progress throughout the day. The information she has available on her handheld includes previous calls and other activities, notes, and physician prescription history.

Before meeting with the physician, she goes to the samples closet in his office and drops off the samples. She records the lot numbers on her handheld device.

When she meets with the doctor, she describes the samples she has left for him, explains the benefits of key products, and discuss the doctor's concerns. He expresses interest in additional product samples so she records additional samples to the contact call. She then captures the doctor's signature on the handheld device.

After the meeting, the sales representative records the information on the products detailed and promotional items and issues discussed. After she has reviewed the information and verified that it is accurate, she submits the call.

Scenario for Planning and Recording Calls in Pharma Handheld

That same day, another sales representative sets off to visit several clinics. Unlike the first sales representative, this representative does not schedule his calls on his laptop beforehand for two reasons. First, he plans to call on group practices with many physicians, and he cannot be sure which physician will be signing for the samples. Secondly, he prefers to enter sample information manually rather than using a Smart Call template.

Before he enters the first clinic, he queries for physicians associated with that address. Seven names appear. When he walks in, he encounters one of the doctors so he selects that physician's record and adds a new call. While speaking with the doctor about the benefits of the product, the sales representative hands him some samples and records the samples dropped information. He then obtains the doctor's signature on the handheld device. After adding a comment about the call and recording products detailed, the sales representative submits the call.

Call Management Procedures in Siebel Pharma Handheld

This section provides the following procedures related to planning, recording, and submitting calls.

- Updating personal lists:
 - [To create personal lists on page 154](#)
- Creating, recording, and submitting contact calls:
 - [To add a contact call from the Contacts view on page 155](#)
 - [To add a contact call from the Contact Calls view on page 157](#)
 - [To apply a Smart Call template on page 157](#)
 - [To delete unused records created from the Auto Call button on page 158](#)
 - [To record information about products detailed on page 158](#)
 - [To record information about samples dropped on page 159](#)

- To record information about promotional items dropped on page 160
- To record information about decision issues discussed during the call on page 160
- To capture a signature on page 160
- To submit a completed contact call on page 161
- Creating, recording, and submitting account calls:
 - To add an account call from the Accounts view on page 162
 - To add an account call from the Account Call view on page 163
 - To delete unused account call records created with the Auto Call button on page 164
 - To enter products detailed information for an account call on page 164
 - To enter attendee information for an account call on page 165
 - To submit a completed account call on page 165

Creating Personal Lists in Pharma Handheld

Personal lists determine which products appear in the drop-down lists of the Call Products Detailed, Samples Dropped, and Promotional Items Dropped views. Limiting the number of products in the lists allows for faster call reporting.

Before you can record call details, you must configure personal lists of the products you promote, the products you distribute as samples, and the products you provide as promotional items. In addition, you must specify at least one product in a personal list or the corresponding drop-down list will be empty when you try to enter call details.

Setting up personal lists is a one-time setup procedure. After you have completed this task, you do not need to repeat it. You can revise personal lists at any time to delete or add products as necessary.

To create personal lists

- 1** Navigate to the Personal Lists screen.
- 2** From the Show drop-down list, select Details, Promotional Items, or Samples to include that item on this personal list.
- 3** On the toolbar, tap the New Record button.

- 4 In the new row, complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Order	<p>Enter a number that indicates where this product should appear in the drop-down list. This field appears in the Details list, Samples list, and Promotional Items list.</p> <p>For example, if you want a product in the Details list to appear first, enter 1. If this field is null for <i>all</i> products in the list, the products will appear in alphabetical order. If this field is null for some products but not for others, records with a null Order field appear at the beginning of the list, in alphabetical order.</p>
Product	The products being detailed during contact and account calls. This field appears in the Personal Lists, Details view.
Promotional Item	The promotional items being dropped during contact and account calls. This field appears in the Personal Lists, Promotional Items view.
Sample	The products to be dropped as samples during contact and account calls. This field appears in the Personal Lists, Samples view.

Creating Contact Calls in Pharma Handheld

You can create contact calls and update contact call details using Pharma Handheld. Because contact calls are a type of activity, they also appear in the Calendar view.

As a shortcut for creating contact calls, you optionally may apply a Smart Call to the new record or auto-create a record to populate it with predefined data. For more information, see [“About Auto Call, Smart Call, and Auto Update” on page 151](#). Before you can enter information about products detailed, samples, and promotional items dropped during a contact call, you must set up personal lists. For more information, see [“Creating Personal Lists in Pharma Handheld” on page 154](#).

To add a contact call from the Contacts view

- 1 Navigate to the Contacts screen.

The My Contacts list appears.

- 2 Select a contact in the Contacts list.

NOTE: If you are using the Auto Call feature, you can select several contacts from the list. Selecting the Auto Call button creates new calls for the selected contacts. Users should be advised that selecting more than one contact at a time to generate Auto Calls affects performance.

- 3 In the Contacts list, do one of the following:

- Tap the Auto Call button to populate the new call with items from your Personal List and then select Calls from the Show drop-down list.

After selecting Auto Call, the Status field in the Contacts Calls view displays "Auto-Created."

- Tap the New Call button and complete the fields in the new form.

Some of the fields are described in the following table.

Field	Comments
Last Name	The contact to be visited during this call.
Ref #	A reference number for this call. This reference number becomes the transaction number (Transaction # field) for a samples transaction corresponding to this call.
Smart Call	Smart Call is a prepopulated call template that can be associated with this call. Make a selection from the Pick Smart Call dialog box.
Status	The status of this call. The default value is Planned. After synchronization, this value changes to Synchronized for calls that have not been submitted. You cannot select the value Submitted. To change the status of the call to Submitted, you must submit the call.
Paper Sign	Indicates that the contact provided a paper signature for a sample disbursement.
Remake Receipt	Used to create an updated sample receipt and signature in the event that the original call information was incorrect. For example, if Dr. Smith mistakenly signs for the receipt of samples on a request form having a different physician's name (such Dr. Jones), then the sample form is inaccurate. In this example, the sales representative must change the name on the original call to the correct physician (Dr. Smith) and have Dr. Smith sign again. Using the Remake Receipt check box, the sales representative can capture a second signature on the corrected sample form. Pharma Handheld automatically tracks the appropriate audit trail information required by the FDA in the remake receipt functionality.

- To specify which products to detail during the call:
 - From the Show drop-down list, select Details.
 - Tap the Contact Call Details list to select it, add a new record, and complete the necessary fields.
- To specify which samples to drop off during the call:
 - From the Show drop-down list, select Samples Dropped.
 - Tap the Samples Dropped list to select it, add a new record, and complete the necessary fields.
- To specify which products are promotional items:

- a From the Show drop-down list, select Promotional Items.
 - b Tap the Promotional Items list to select it, add a new record, and complete the necessary fields.
- 7 To specify which issues were discussed during a call:
- a From the Show drop-down list, select Issues.
- NOTE:** Decision issues are the objections a contact may raise when evaluating a product before making a prescribing decision.
- b Tap the Issues list to select it, add a new record, and complete the necessary fields.

For more information on how to enter information, see [“Recording Contact Calls in Siebel Pharma Handheld” on page 158.](#)

NOTE: If you applied a Smart Call to the call, you may only need to verify that the information in the four lists is accurate.

To add a contact call from the Contact Calls view

- 1 Navigate to the Contact Call screen, and tap the Contact Call form to select it.
- 2 On the toolbar, tap the New Record button.
- 3 Complete the necessary fields.

To add a contact call from the Calendar screen

- 1 Navigate to Calendar screen.
- 2 Navigate to the Daily view for the day you want to schedule your call.
- 3 Highlight time frame for the Contact Call you want to schedule.
- 4 Click New Call button.
- 5 The Contact Call Screen appears with Date/Time field prepopulated with the date/time you selected.
- 6 Complete the necessary fields.

To apply a Smart Call template

- 1 Navigate to the Contact Call screen, and tap the Contact Call form to select it.
- 2 On the toolbar, tap the New Record button.
- 3 In the new record, complete the necessary fields.
- 4 In the Smart Call field, tap the drop-down list arrow.
The Pick Smart Call list appears.
- 5 Select a Smart Call template, and tap OK.

To delete unused records created from the Auto Call button

1 Using the Sign button:

- From the parent Contact Call form, tap the Sign button.

Selecting the Sign button deletes all dropped records from unused samples, making sure that the physician only signs for samples that he or she was actually given. To delete detailed records for unused products, select the Submit button.

2 Using the Auto Update button:

- From the My Contacts view, tap the Auto Update button.

For example, suppose you have used the Auto Call button to create three contact calls, but were unable to visit one of the physicians. Selecting Auto Update deletes the unused record.

NOTE: Performance is affected if users select Auto Update when they have more than one unused auto-created call. It is recommended that users have no more than three unused auto-created calls when using the Auto Update feature.

Recording Contact Calls in Siebel Pharma Handheld

Contact calls are used to track a planned or past call activity with a contact. You can enter contact call details directly in Pharma Handheld.

To record a contact call, users must complete the following tasks, which are included below:

- Enter information on products detailed.
- Enter information about samples dropped.
- Enter information about promotional items dropped (optional).
- Record any decision issues (optional).
- Capture signatures.
- Submit the call.

The next sections explain how to perform each of these tasks. If you have not yet set up your personal lists, you must do so before you can proceed with the next steps. For more information, see [“Creating Personal Lists in Pharma Handheld” on page 154](#).

To record information about products detailed

1 Navigate to the Contact Call screen, and select the desired contact call.

NOTE: If you have not yet set up your personal lists, you must do so before you can proceed with the next step.

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

The Product Details view appears.

- 3 Tap the Product Details list to select it.
- 4 On the toolbar, tap the New Record button to add a record for each product discussed during the call.
- 5 Complete the fields for each record.

Some of the fields are described in the following table.

Field	Comments
Indication	The purpose or therapeutic area for which a drug is designed.
Priority	Priority of this product relative to others discussed during the call.
Name	The name of the product detailed during the call. The products appearing in this drop-down list are based on the products added to your Personal list. For more information on adding products to your personal lists, see “Creating Personal Lists in Pharma Handheld” on page 154

To record information about samples dropped

- 1 Navigate to the Contact Call screen, and select the desired contact call.
- 2 In the Contact Call form, enter a reference number (if required) in the Ref # field.
- 3 From the Show drop-down list, select Samples Dropped.

The Samples Dropped list appears.

- 4 Tap the Samples Dropped list to select it, and then add a record and complete the fields for each product dropped during the call.

Some of the fields are described in the following table.

Field	Comments
Lot #	The lot number (if applicable) of the products dropped during the call. If tracking samples by lot number, select a lot number in the Pick Lot dialog box.
Name	The name of the products dropped during the call. The products appearing in this drop-down list are based on the products available in your samples inventory. For more information on samples, see “Managing Samples in Siebel Pharma Handheld” on page 169 .
Quantity	The quantity of samples dropped during the call.

NOTE: If the samples you dropped do not appear in the Name field drop-down list, you may need to acknowledge the receipt of the samples within the system. Go to the Samples Receipts screen and submit any records with a status of In Progress. For more information, see [“Acknowledging Receipt of a Samples Transfer in Pharma Handheld” on page 177](#). If the samples you dropped still do not appear, contact your samples administrator.

To record information about promotional items dropped

- 1 Navigate to the Contact Call screen, and select the desired contact call.
- 2 From the Show drop-down list, select Promotional Items.
The Promotional Items view appears.
- 3 In the Promotional Items list, add a record for each item dropped during the call, and complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Name	The promotional item dropped during the call. The items appearing in this drop-down list are based on items added to your Personal Promotional Items list. For more information, see Creating Personal Lists in Pharma Handheld on page 154 .
Quantity	The quantity of the promotional item dropped during the call.

To record information about decision issues discussed during the call

- 1 Navigate to the Contact Call screen, and select the desired contact call.
- 2 From the Show drop-down list, select Issues.
The Professional Issues view appears.
- 3 Tap the Issues list to select it.
- 4 On the toolbar, tap New Record to add a record for each issue discussed during the call.
- 5 Complete the necessary fields for each new record.

NOTE: Decision issues are the objections a contact may raise when evaluating a product before making a prescribing decision.

You can use Pharma Handheld to electronically capture signatures. For the application to accept a signature:

- Make sure the title field for the contact from Contacts, My Contacts view is populated.
- Make sure the contact's license number appears in the License # field of the Contact view. Licenses are associated with the contact's address.

To capture a signature

- 1 Navigate to the Contact Call screen, and select the desired parent Contact Call form.

- 2 Tap the Sign button to launch the Signature Capture view.

The Signature Capture view contains the company name, samples recorded when the call gets submitted, a disclaimer (as set up by the administrator on the Web client), and contact information.

If you want to invert the signature display, tap the Signature Flip button instead of the Sign button. Inverting the signature display allows you to extend the handheld device toward the contact for a signature without turning the device around.

- 3 In the Signature Capture view, have the contact sign on the white surface.
- 4 Perform one of the following actions:
 - Tap OK to submit the record.
 - Tap Cancel to abort the procedure.
 - Tap Clear to erase the signature area.
 - Tap Change Contact to select the correct contact whose signature you are capturing.

NOTE: The application automatically locks the keyboard hot keys when the Signature Capture view is displayed.

Changing Contacts While in Signature Capture View

Sales representatives may find themselves in a position where they will need to switch contacts in order to get a required signature. You can change a contact within the signature capture screen.

To change contact while in Signature Capture view

- 1 In signature capture screen, tap the Change button.
- 2 From the Pick Contact list, select the desired contact.

NOTE: By default only the contacts that are affiliated to the accounts this contact is affiliated to will show on the pick applet. Users can select All Contacts button to show all contacts regardless of their affiliation

- 3 Tap Pick and Sign.
The signature capture view appears with the new contact information just selected.
- 4 Tap OK to commit the signature.

To submit a completed contact call

- 1 Navigate to the Contact Call screen, and select the desired contact call.
NOTE: You cannot submit a call with a future date.
- 2 Verify that the information for the Contact Call is accurate and complete. For more information, see:
 - [To record information about products detailed on page 158](#)

- To record information about samples dropped on page 159
- To record information about promotional items dropped on page 160
- To record information about decision issues discussed during the call on page 160

NOTE: After you submit a call, you cannot modify any fields except the Comment field.

- 3 If you dropped samples when making the call, verify that you entered a samples reference number in the Ref # field in the Contact Call form.

CAUTION: If you are a mobile user, submit your calls *before* connecting to the server, and then synchronize. Mobile users should *not* submit calls while connected to the server or they run the risk of introducing errors into their inventory counts.

- 4 Contact Call form, tap Submit.

If the call passes all of the validations, the application:

- Creates a samples disbursement transaction with a line item for each dropped sample recorded for the call.
- Submits a disbursement transaction to update the samples inventory. If the submission of the disbursement transaction is successful, the application changes the call's Status field to Submitted.
- Sets appropriate fields in the call record to read-only.

For more information on submitting records, see [“How Siebel Samples Management Works with Calls” on page 171](#).

Creating Account Calls in Pharma Handheld

Account Calls are used to track a planned or past call activity at an account. You can enter account call details directly in Pharma Handheld.

For more information on entering call details, see [“Recording Account Calls in Siebel Pharma Handheld” on page 164](#).

NOTE: Before users can enter information about products detailed and attendees associated with an account call, they must set up their personal lists. For more information, see [“Creating Personal Lists in Pharma Handheld” on page 154](#).

To add an account call from the Accounts view

- 1 Navigate to the Accounts screen.
- 2 In the Accounts list, do one of the following:

- Select the Auto Call button to populate the new call with items from the Personal Lists, and then select Calls from the Show drop-down list.

NOTE: When you select Auto Call in the My Accounts view, the application populates the product Details list for all attendees associated with the account call. When you select Auto Call in the Account Calls, Attendees view, the application populates the Samples Dropped list for the selected attendees.

After selecting Auto Call, the Status field in the Accounts view displays "Auto-Created."

- Tap the New Call button and complete the fields in the new form.

Some of the fields are described in the following table.

Field	Comments
Name	The account to be visited during this call. Make a selection from the Pick Account dialog box.
Site	A unique location identifier that distinguishes this account from any other accounts with the same name.
Smart Call	The Smart Call template to be associated with this call. Make a selection from the Pick Smart Call dialog box. A Smart Call is a template that you apply to contact calls that defines information about the products detailed, samples and promotional items distributed, and issues discussed on a call. After you apply a Smart Call template to a call, you can make additional edits.
Status	The status of this call. The default value is Planned. You cannot select the value Submitted. To change the status of the call to Submitted, you must submit the call. For more information, see "To submit a completed account call" on page 165.

- 3 From the Show drop-down list, select the following and add records, if necessary:

- Details
- Attendees

- 4 From the parent Account Call form, select the Submit button.

For more information entering information in the Details and Attendees lists and submitting a call, see ["Recording Account Calls in Siebel Pharma Handheld" on page 164.](#)

To add an account call from the Account Call view

- 1 Navigate to the Account Call screen.
- 2 On the toolbar, tap the New Record button.
- 3 In the Account Call form, complete the necessary fields.

To delete unused account call records created with the Auto Call button

- 1 Navigate to the Accounts screen.
The My Accounts screen appears.
- 2 Tap the Auto Update button.

NOTE: Performance will be affected if you select Auto Update when you have more than one unused auto-created call. Users are advised to have no more than three unused auto-created calls when using the Auto Update feature.

To delete unused attendee calls created with the Auto Call button

- 1 Navigate to the Account Call screen, and from the Show drop-down list, select Attendees.
- 2 Tap the Auto Update button.

NOTE: Performance will be affected if you select Auto Update when you have more than one unused auto-created call. Users are advised to have no more than three unused auto-created calls when using the Auto Update feature.

Recording Account Calls in Siebel Pharma Handheld

Account calls are used to track a planned or past call activity with an account. You can enter account call details directly in Pharma Handheld.

To record an account call, users must complete the following procedures:

- Enter information on products detailed.
- Enter attendee information (the names of contacts met and any samples dropped).
- Enter information about any activities related to the call (optional).
- Submit the call.

The next sections explain how to perform each of these tasks. You must set up your personal lists before you can complete this procedure. For more information, see [“Creating Personal Lists in Pharma Handheld” on page 154](#).

To enter products detailed information for an account call

- 1 Navigate to the Account Call screen, and select the desired account call.
- 2 From the Show drop-down list, select Details.

- 3 In the Details list, add a record for each product detailed during the call, and complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Indication	The purpose or therapeutic area for which a drug is designed.
Priority	Priority of this product relative to others discussed during the call.
Name	The product detailed during the call. The products appearing in this drop-down list are based on the products added to your Personal List.

To enter attendee information for an account call

- 1 Navigate to the Account Call screen, and select the desired account call.
- 2 From the Show drop-down list, select Attendees.
- 3 Tap the Attendee list, to select it.
- 4 On the toolbar, tap the New Record button to add a new record for each attendee.

NOTE: The pick list will, by default, only show contacts that are affiliated to the chosen Account. To show all contacts regardless of affiliation, tap the All Contacts button in the Pick Contact list.

- 5 Complete the fields for each attendee.

- a In the Last Name field, tap the drop-down list arrow.
- b From the Pick Contact dialog box, select those contacts you want to add as attendees.

The application creates an attendee call record (similar to a contact call) for each contact you include as an attendee of the account call. These attendee call records are child records of the account call and can be accessed by going to the Account Call and finding the associated attendee. Drilling down on the attendee last name hyperlink enable you to navigate to and access the appropriate attendee call details view.

- 6 To create an attendee call, do one of the following:
 - Select the Auto Call button to populate the attendee call with items from the personal lists, and then select Calls from the Show drop-down list.
After selecting Auto Call, the Status field in the Accounts view displays "Auto-Created."
 - Drill down on the Last Name hyperlink and complete the fields in the Contact Calls details.

NOTE: You must set up your personal lists before you can complete the next step. For more information, see ["Creating Personal Lists in Pharma Handheld"](#) on page 154.

To submit a completed account call

- 1 Navigate to the Account Call screen, and select the desired account call.

NOTE: You cannot submit a call with a future date.

- 2 Verify that the information for the Account Call is accurate and complete.

For more information, see:

- To enter products detailed information for an account call on page 164
- To enter attendee information for an account call on page 165

CAUTION: If you are a mobile user, submit your calls *before* connecting to the server, and then synchronize. Mobile users should *not* submit calls while connected to the server or they run the risk of introducing errors into their inventory counts.

- 3 In the Account Call form, select Submit.

If the call passes all of the validations, the application:

- Creates a samples disbursement transaction with a line item for each dropped sample recorded for the call.
- Submits a disbursement transaction to update the samples inventory. If the submission of the disbursement transaction is successful, the application changes the call's Status field to Submitted.
- Sets many fields in the call record to read-only.

NOTE: If attendees are recorded in an account call, an attendee call is created for each attendee, and the process described above is performed for each attendee call. Attendee calls are the same as contact calls except that they do not appear in the Activities view and they are submitted automatically when the account call is submitted.

Creating General Activities in Siebel Pharma Handheld

Sales representatives use general activities to manage time and schedule demands and to keep their manager informed of their workload. A general activity in Pharma Handheld is used to track non-call tasks such as to-do items, personal events, and correspondence.

In a typical scenario, a sales manager for a pharmaceutical company uses the Activities screen to create and track the activities on which she plans to spend her time during the next month. After scheduling a contact call with a customer, she uses the Calendar to review scheduled activities for the upcoming weeks.

This section provides procedures for adding activities from the Activities and Calendar views.

Adding General Activities from Activities in Pharma Handheld

All activities with valid dates and times appear in the Pharma Handheld Calendar views as well as in the Activities views. The Calendar views provide a visual representation of each user's scheduled activities.

NOTE: The Planned Start and Duration fields in general activities and appointments must contain entries in order for the appointments and activities to appear in the correct time period in the Daily Calendar view. While the Planned Start field is visible in the Activities screen's My Activities view, this field is not visible in the Contacts screen's Activities and Accounts > Activities views. The Planned Start field can be exposed during application configuration.

To add a general activity from the Activities view

- 1 Navigate to the Activities screen.
The My Activities list appears.
- 2 On the toolbar, tap the New Record button.
- 3 In the new row, complete the necessary fields.

NOTE: Select **More Info** from the **Show** drop-down list to edit additional fields for each record.

Some of the fields are described in the following table.

Field	Comments
Activity	Activities entered here are set as "General" and are not editable. Calls created from the New Call button are set as "Contact Call" or "Account Call" depending on whether these calls were created for a contact or an account. Previously created Contact Calls and Account Calls are displayed on the Activities view.
Activity Type	The type of activity. The values displayed in this drop-down list depend on the value of the Activity field. For example, the activity types that you can select for a contact call are different from those that you can select for a general activity.
Assigned To	The sales representative responsible for the activity. The Assigned To field in all Activities views (Activities, My Activities list; Activities, More Info form; Contacts, Activities list; and Accounts, Activities list) is read-only.
Duration	The length of time, in minutes, that you expect the activity to take.
Last Name	The last name of the contact associated with the activity. The Last Name field on the Activities, My Activities view and the Accounts, Activities view is read-only.

Adding General Activities Using Calendar in Pharma Handheld

General activities and appointments must have the Planned Start and Duration fields populated in order to be displayed in the correct time slot on the Daily Calendar view.

To add a general activity in the Calendar view

- 1 Navigate to the Calendar screen.
- 2 From the Show drop-down list, select Daily, Weekly, or Monthly.
- 3 For Weekly or Monthly, select the day and time on which you want to schedule a general activity.
- 4 On the toolbar, tap the New Record button or double-tap on a row.
- 5 In the new record, complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Account	Complete this field if the activity is related to a particular account.
Planned Start	If you started from the Daily Calendar view, this date reflects the time selected when you created the new appointment. If you started from the Weekly Calendar or Monthly Calendar view, the first time slot of the day is supplied.
Type	The type of activity. The values displayed in this drop-down depend on the kind of activity.
Repeat	Checking this box allows you to set the end date of a repeating appointment (Until). If you do not select a value, 12 more appointments will be scheduled.

- 6 To specify contact participants:
 - a From the Show drop-down list, select Contact Participants.
 - b Tap the Contacts list to select it.
 - c On the toolbar, tap the New Record button.
 - d In the Add Contacts dialog box, select participants and then tap OK.
- 7 To specify employee participants:
 - a From the Show drop-down list, select Employee Participants.
 - b Tap the Employee Participants list to select it.
 - c On the toolbar, tap the New Record button.
 - d In the Add Employees dialog box, select participants, and then tap OK.

Managing Samples in Siebel Pharma Handheld

Most pharmaceutical manufacturers provide free samples to health care professionals in an effort to influence the prescribing habits of physicians and accounts across the United States and the world. In the United States, samples distribution is regulated by the FDA and must be reconciled at least once a year.

Pharma Handheld maintains a samples transaction record for samples transfer, receipt, disbursement, order, and inventory adjustment. The application assigns each samples transaction record a unique identifier for tracking purposes. Depending on the type of transaction, you can display this identifier as a transaction number, an order number, an invoice number, or a transfer number.

This section describes managing and maintaining an electronic inventory of samples and promotional items within Pharma Handheld. As part of managing samples, you can track an electronic inventory of samples stock, create request orders and transfers for samples, and acknowledge receipt of sample transfers directly in Pharma Handheld. You can use either Siebel Pharma or Siebel Pharma Handheld to manage your samples, however you cannot use both applications to handle samples transactions. Reconciling inventory must be performed in Siebel Pharma. This section includes the following topics on managing samples in Pharma Handheld.

- [“Keeping Server and Handheld Samples Records in Sync” on page 169](#)
- [“Scenario for Managing Samples in Pharma Handheld” on page 170](#)
- [“How Siebel Samples Management Works with Calls” on page 171](#)
- [“About Pharma Handheld Inventory Periods” on page 172](#)
- [“About Establishing an Initial Inventory Count in Pharma Handheld” on page 172](#)
- [“About Pharma Handheld Samples Views” on page 174](#)
- [“Creating a Samples Order in Pharma Handheld” on page 175](#)
- [“Creating a Samples Transfer in Pharma Handheld” on page 176](#)
- [“Acknowledging Receipt of a Samples Transfer in Pharma Handheld” on page 177](#)
- [“Adjusting a Samples Transaction” on page 178](#)

Keeping Server and Handheld Samples Records in Sync

Administrators can manage samples inventory using either Siebel Pharma Handheld or Siebel Pharma, but should not use both. In order to keep samples inventories in sync, end users should be prevented from submitting a samples transaction on the server when the same record is still editable on their handheld device.

When a user submits a record, the status changes to Submitted and it becomes read-only, meaning no additional operations are allowed on the record. By updating a user property and writing two small Visual Basic scripts, you can specify that synchronized records are also read-only.

- First, the administrator changes the value of the user property “Update Status To Synchronized” to Y.

Making this change invokes the UpdateStatusToSynchronized method on the Sample Txn business component.

- Then, the administrator writes a small Visual Basic script for this method to change the status on the Sample Txn to “Synchronized.”
- Finally, the administrator writes another Visual Basic script to specify that the record becomes read-only when its status changes to “Synchronized.”

This prevents users from accidentally submitting the sample transactions on the server while the same record is still editable on their handheld device.

NOTE: Sample transactions are not logged upon submitting a sample drop. They only appear on the handheld device after syncing.

Scenario for Managing Samples in Pharma Handheld

This scenario is an example of a workflow performed by an end user. Your company may follow a different workflow according to its business requirements.

Near the end of the quarter, a sales representative in the U.S. prepares for FDA-mandated inventory reconciliation. She is required to take a physical inventory of her samples and make sure the quantities match the electronic inventory. To do so, she needs to make sure that all her sample transactions are up-to-date for the current period before submitting the inventory count.

The sales representative remembers that she made a sample disbursement mistake earlier in the day. She accidentally had a physician sign for 10 samples when she really only dropped off five. Therefore, she needs to make a samples adjustment for this transaction.

In Pharma Handheld, she finds the sample transaction record. Then, she selects the adjust quantity feature, which automatically shifts the transaction status to “In Progress” for the new adjustment record and to “Adjusted” for the already-submitted sample transaction. When she submits the adjustment record, Pharma Handheld updates her inventory to reflect the lower quantity that was disbursed and changes the sample quantity for the actual call from ten to five.

The sales representative also had some samples that had expired, which she physically mailed back to her samples administrator. She now has to record this transaction into her electronic inventory. In the Samples Transfer view, she creates a new record. Then she adds three new sample line item records and selects the Submit button. This changes the status to submitted, locks the records, and updates the handheld inventory to reflect the transfer.

The sales representative is now ready for the actual inventory count. While physically standing in her personal samples closet with her handheld device, she opens the Samples Inventory Count view. From this view, she sees the products listed in her personal inventory according to the electronic count. She goes down the list, product by product, lot by lot, counting each product and lot number combination.

She enters the actual quantity that she finds into Pharma Handheld and notices that the application automatically updates the difference field to reflect discrepancies between the on-hand and electronic inventory. When she is finished, she verifies that the differences are zero. She is now ready to submit her inventory count. Submitting causes a new inventory period to open, displaying the current date and time.

How Siebel Samples Management Works with Calls

This section describes how Siebel Samples Management works with the Contact Call Detail and Account Call Detail views. For more information on recording calls, see [“Planning and Recording Calls in Siebel Pharma Handheld” on page 151](#).

When you select the Submit button in either the Contact Call and Account Call forms, the application verifies that:

- The call's date and time is the same as or earlier than the current date and time. A call cannot be submitted with a future date.

If dropped samples are recorded for the call, the application checks that:

- The Ref# field is not empty. This is controlled by the user properties setting. If the user property for reference number required is set to Y, then the application displays an error message if this field is not populated by the user. Otherwise, the application will automatically populate this field.
- The samples exist in the inventory for the period indicated by the call's date and time.
- The period into which the samples will be recorded is an unreconciled period. If it is a reconciled period, a warning message appears.
- A valid lot number has been specified for dropped samples tracked by lot number.

If the call passes these checks, the application:

- Creates a samples disbursement transaction with a line item for each dropped sample recorded for the call.
- Submits a disbursement transaction to update the samples inventory. If the submission of the disbursement transaction is successful, the application changes the call's Status field to Submitted.
- Converts many fields in the call record to read-only.

An administrator can change the fields that become read-only after a call is submitted.

NOTE: If attendees are recorded in an account call, an attendee call is created for each attendee, and the process described above is performed for each attendee call. Attendee calls are the same as contact calls except that they do not appear in the Activities view and they are submitted automatically when the account call is submitted.

About Pharma Handheld Inventory Periods

Siebel Samples Management provides three types of inventory periods for maximum flexibility. These period types are described in [Table 36](#).

Table 36. Samples Inventory Periods

Period Type	Description
Active	The current period; it shows no end date and it is not reconciled. You can enter any type of samples transaction, including adding new products; inventory counts will be adjusted accordingly.
Inactive	A past, unreconciled period; it shows an end date but has not been reconciled yet. Except for adding new products into inventory, you can enter any type of samples transaction.
Reconciled	A past, inactive period; reconciled periods will not display on the handheld application.

About Establishing an Initial Inventory Count in Pharma Handheld

Establishing an initial master inventory is only necessary if you are manually entering and tracking samples. Either an administrator or an end user may establish an inventory. However, because Siebel Samples Management routes and maintains transactions by Employee ID, only the user who creates an inventory (the initial inventory count) can create or manipulate that inventory.

Before adding products to the master inventory, you must verify that the products are correctly defined for inventory tracking. In particular, make sure that the products are Orderable and have either Inventory or Lot # tracking.

NOTE: End users do not need to perform the procedures described in this section if their initial counts consist only of samples transfers routed to them by their samples administrator. Instead, they should simply acknowledge the receipt of those shipments. For more information, see ["To acknowledge receipt of a samples transfer" on page 177](#). However, end users do need to perform the procedures described in this section if their initial counts contain any records that they entered manually. End users who enter records manually must submit those counts and reconcile the initial inventory period.

To establish an initial master inventory:

- **Count products on hand.** Establish an inventory count by physically counting the products currently on hand. This process creates a list of the products in your inventory and an inventory period solely for your initial count.
- **Add products and submit count.** Add products to the inventory and submit an initial count. (See ["To add products to inventory and submit an initial count" on page 173](#).)

- **Submit adjustments.** Create and submit adjustments for the initial count. For more information, see [“To create and submit initial count adjustments” on page 173](#).
- **Reconcile.** Reconcile the initial inventory period using Siebel Pharma. For more information, see *Siebel Life Sciences Guide*.

To add products to inventory and submit an initial count

- 1 Navigate to the Samples Adjustments screen.
The Inventory Count list appears.
- 2 On the toolbar, tap the New Record button to add a new row.
- 3 Complete the necessary fields.

NOTE: Some of the fields are described in the following table. Users cannot sort on the Difference and On Hand Qty fields in the Inventory Count applet.

Field	Comments
Count	The amount of your initial inventory.
Difference	Shows a negative number after you enter a value in the Count field.
Lot	The lot number for this sample.
Sample	The name of the sample to be added.

- 4 Tap Submit.
The Difference field is cleared for all records. The application transfers the number you entered in the Count field to the On Hand Quantity field and clears the Count field.
Once you submit an initial count, the Siebel Samples Management deactivates the inventory period into which you entered your initial counts and creates a new active inventory period. You can view this change using the My Samples History filter.
- 5 From the Show drop-down list, select Samples History.
The Samples History view appears. The inventory period into which you entered your initial counts becomes inactive—a date and time appear in the End Date field, and there is no check mark in the Active field. In addition, a new active period has been opened.

NOTE: You cannot submit an adjustment transaction if the product is not currently active. Siebel Samples Management considers a product inactive if the administrator has made it inactive, or the product does not exist in the inventory count list.

To create and submit initial count adjustments

- 1 Navigate to the Samples Adjustments screen.
- 2 From the Show drop-down list, select Adjustments.
The Samples Adjustments list appears.

- 3 On the toolbar, tap the New Record button add a new record.

The Sample Adjustment Details form and list appear.

- 4 Complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Txn. #	Transaction Number. The application automatically generates an unique identifier. You can change this value.
Txn. Date	Transaction Date. The date of the adjustment transaction. Make sure that this date falls within the valid date ranges for the appropriate Inventory Period.
Adj. Reason	Adjustment Reason. Select Initial Count from the drop-down list.
Status	The application automatically changes this field value to Submitted when you submit the adjustment.

- 5 From the Show drop-down list, select the Adj. Details view.

- 6 On the toolbar, tap the New Record button.

- 7 Complete the necessary fields.

Repeat the previous steps to enter a line item for each sample needing adjustment.

- 8 Tap Submit.

The values in the Transaction Status field (in the Samples Adjustment form) and the Item Status fields (in the Line Items list) change to Submitted.

NOTE: You must reconcile adjustments using Siebel Pharma. For more information, see *Siebel Life Sciences Guide*.

About Pharma Handheld Samples Views

Pharma Handheld contains these main screens related to sample management:

- **Samples.** Navigate to this screen to display a history of samples and an inventory list.
- **Samples Adjustments.** Navigate to this screen to adjust sample transaction records, such as correcting quantities dropped off, or to display your on-hand inventory count.
- **Samples Receipts.** Navigate to this screen to acknowledge the receipt of a samples transfer or to display a list of receipts, and to review receipt details.
- **Samples Transfers.** Navigate to this screen to create a transfer, to display a list of transfers to or from your inventory, and to review transfer details.
- **Samples Orders.** Navigate to this screen to create an order for samples, to display a history of orders, and to review order details.

Creating a Samples Order in Pharma Handheld

You can request additional samples by creating a samples order using Pharma Handheld.

After synchronizing, Siebel Pharma routes the samples order to the samples administrator. The samples administrator then creates a samples transfer that is routed back to the requestor. After the requestor acknowledges receipt of the transfer, Siebel Samples Management automatically enters the new inventory into their inventory counts.

To create a samples order

- 1 Navigate to the Samples Orders screen.

The Orders list appears.

- 2 On the toolbar, tap the New Record button.
- 3 In the new record, complete the necessary fields.

The application automatically sets the Order Date field to a date and time in the active period. It also automatically generates values for the Order # field, but it can be edited. You might want to edit this value to have the items appear in a particular order (other than the order in which you entered them).

NOTE: It is not necessary to change the Order Type field. You can include both samples and promotional items in a single order.

- 4 Drill down on the Order # hyperlink.
- 5 Tap the Samples Order Details list to select it.
- 6 On the toolbar, tap the New Record button.
- 7 Complete the necessary fields for the new record.

Some of the fields are described in the following table.

Field	Comments
Sample	The product to be ordered. Tap the arrow in the Sample field, choose the product from the Pick Product list, and then tap OK.
Quantity	The sample quantity that you are ordering.
Item Status	Initially set to In Progress. The application automatically changes this field value to Submitted when you submit the transaction.

- 8 Repeat the previous steps to enter a line item for each product or promotional item you want to order.
- 9 Tap Submit.

NOTE: You cannot modify or delete an order after it has been submitted.

The values of the Status field (in the form) and the Item Status field (in the list) change to Submitted.

Creating a Samples Transfer in Pharma Handheld

You can create a samples transfer to exchange samples between one another or to return samples to the home office.

After the samples transfer is submitted into the system, the recipient receives a samples transfer. After the recipient acknowledges the receipt of the transaction, the application enters the new inventory into his or her inventory count.

NOTE: Samples returns are defined as transfer transactions for which corresponding received shipment transactions have *not* been created. Returned samples are subtracted from the sender's inventory counts but are *not* added to the master inventory, as they are typically expired or damaged products.

To create a samples transfer

- 1 Navigate to the Samples Transfers screen.
The Transfers list appears.
- 2 On the toolbar, tap the New Record button.
- 3 In the new row, complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Transfer #	The application automatically generates a unique identifier. You can change this value.
Transfer Date	The application automatically generates a date and time value that falls in the active period.
Transfer Type	Select the appropriate value: <ul style="list-style-type: none"> ■ Transfer Out - Indicates you are transferring samples to another employee. ■ Return - Indicates you are returning samples to the home office. Samples are typically returned because they are expired or damaged products that should be destroyed. Transfers with the Transfer Type field set to Return do not generate shipment transactions (because there is no recipient), and they are <i>not</i> added to the master inventory counts.
Status	The application automatically changes this field value to Submitted when you submit the transaction.
Transfer Lst Name	Transfer Last Name. The employee to whom you are transferring the samples. If the value of the Transfer Type field is Transfer Out, then you must complete this field. Leave this field empty if the value of the Transfer Type field is Return.

- 4 Drill down on the Transfer # hyperlink.

- 5 Tap the Sent Samples Details list to select it.
- 6 On the toolbar, select the New Record button.
- 7 In the new row, complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Sample	The samples being transferred.
Quantity	The quantity that you are transferring.
Lot #	The lot number for this samples transfer.
Item Status	The application automatically changes this field value to Submitted when you submit the transaction.

- 8 Repeat the previous steps to enter a line item for each product or promotional item you are transferring.
- 9 Tap Submit.

NOTE: You cannot modify or delete a transfer transaction after it has been submitted. The transaction will appear in the Samples History list as part of the Inventory List view.

Acknowledging Receipt of a Samples Transfer in Pharma Handheld

Siebel Samples Management supports two ways of electronically moving samples inventory:

- By creating a samples transfer (see [“Creating a Samples Transfer in Pharma Handheld” on page 176.](#))
- By creating a samples order (see [“Creating a Samples Order in Pharma Handheld” on page 175.](#))

In either case, the application creates a samples transfer transaction and routes it to the recipient for acknowledgement. After the recipient submits a receipt, the application transfers the new inventory into the recipient's active inventory period. You can then view the new inventory in the Samples History view.

To acknowledge receipt of a samples transfer

- 1 Navigate to the Samples Receipts screen.
- 2 In the Samples Receipts view, drill down on the Invoice # hyperlink.

The Receipts Details view appears. In the form, samples transfers that have not been acknowledged as received show an Invoice Status value of In Progress. Those that have been acknowledged as received show an Invoice Status value of Submitted.

3 In the Receipts Details list, modify the Received Quantity field if the value does not accurately reflect the quantity received.

4 Tap Submit.

NOTE: The samples transfer quantities do not appear in end users' inventory counts until they submit a samples receipt. However, after the samples receipt has been submitted, it cannot be modified or deleted.

The values in the Invoice Status field (Received Samples list) and the Item Status field (Line Items list) change to Submitted.

5 To verify the submitted transfer was recorded:

a Navigate to the Samples screen.

b From the Show drop-down list, select Samples History.

The Samples History view appears.

c Highlight the appropriate inventory period to view the line items of the received transfers.

Adjusting a Samples Transaction

You can adjust inventory counts of samples stock by making adjustments to past samples transactions directly in Pharma Handheld. Common reasons for adjusting past transactions include product loss or expiration, counting mistakes, or data entry errors. End users can add products or adjust quantities for any type of samples transaction (disbursement, transfer, order, and so on).

NOTE: End users cannot add a product to your inventory that did not exist when the original transaction was created.

The inventory list view displays all the samples for the selected inventory period.

To add a product to a samples transaction

1 Navigate to the Samples screen.

The Samples History list appears.

2 In the Inventory Periods list, select the period containing the transaction.

3 In the Sample History list, select the transaction you would like to update.

You can identify the transaction record in the Samples History list by the Transaction Date, Last Name, or Transaction # field values.

NOTE: To make it easier to find a transaction, sort the records in the Samples History list by the field you are using to identify the transaction. For example, if you know the Transaction #, sort the list by that field to locate the records you are looking for.

4 In the Samples History list, tap Add, and then tap OK.

- 5 In the new row, complete the necessary fields.

When you add a record, the application adds a new line-item record for the transaction in the Samples History list and sets the line-item record's Item field Status to In Progress. With the exception of the Item Status value, the new record is a copy of the record selected in the previous step.

Some of the fields are described in the following table.

Field	Comments
Item Status	<p>The application automatically changes this field value to Submitted when you submit the adjustment.</p> <p>For any row that shows an item status of Submitted, you can also see one or more rows with the identical sample name and transaction number but with an item status of In Progress or Adjusted.</p> <p>Valid values include:</p> <ul style="list-style-type: none"> ■ In Progress - Indicates that the adjustment record has not yet been submitted, so it can still be modified. However, the record's data is not reflected in the inventory count. ■ Submitted - Indicates that the record has been submitted and therefore cannot be modified. Since it has been submitted, the record's data is reflected in the inventory count. ■ Adjusted - Indicates that a previously submitted record has been superseded by a subsequent adjustment record. The record cannot be modified.
Lot #	The correct lot number for this sample. Select the Add button to update this field.
Sample	Verify that the correct product name is selected. Select the Add button to update this field.
Transaction #	The transaction number or, in the case of samples disbursements, the reference number. The Transaction # value corresponds to the Ref # value displayed in the Contact Call Detail view.
Transaction Type	Displays the type of transfer. Valid values include Transfer Out and Transfer In.

To adjust a quantity in a samples transaction

- 1 Navigate to the Samples screen.
The Samples History screen appears.
- 2 In the Inventory Periods list, select the period containing the transaction.
The samples for the selected period are displayed in the list below.

- 3 In the Samples History list, select the transaction you would like to update.

You can identify the transaction record in the Samples History list by the Transaction Date, Last Name, or Transaction # field values.

- 4 Tap Adjust Qty and then tap OK.

The application copies the line-item record for the transaction in the Samples History list and sets the line-item record's Item Status field to In Progress.

- 5 In the Samples History list, enter the correct quantity in the Quantity field.

- 6 Tap Submit, and then tap OK.

The application adds the new item with an Item Status of Submitted and changes the original item record (whose quantity you adjusted) to an Item Status of Adjusted. The new quantity is reflected in the on-hand quantities in the Inventory Count view.

Setting Up MedEd Events in Siebel Pharma Handheld

This section describes how a pharmaceutical company can use Pharma Handheld to plan a medical education (MedEd) event. A MedEd event refers to a promotional or educational event attended by physicians and medical professionals. An event functions as a forum for exchanging information on a particular disease, illness, therapeutic class or product. A medical education event can be as simple as a lunch-and-learn in a physician's office or as complex as a seminar series or national sales meeting.

Sales representatives in the field can use Pharma Handheld to view and create MedEd events and invite contacts to MedEd events. The following section provides instructions for MedEd procedures.

- [Creating a MedEd Event in Pharma Handheld on page 180](#)
- [Inviting Professionals to MedEd Events Using Pharma Handheld on page 181](#)

Creating a MedEd Event in Pharma Handheld

You can create MedEd events directly in Pharma Handheld.

To create a MedEd event

- 1 Navigate to the MedEd screen.
- 2 From the Show drop-down list, select My MedEd Events.
- 3 On the toolbar, select the New Record button.

- 4 In the new list, complete the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Budget	The amount of money budgeted for the event.
CME Credit	Number of CME (Continued Medical Education) credits that can be earned at the event.
Created By	User name for the person who created the MedEd event.
End Date	Date and time that the event ends. Set the time fields before selecting a calendar day.
Start Date	Date and time that the event starts. Set the time fields before selecting a calendar day.
Event Status	Indicates whether the event is active, cancelled, completed, in progress, inactive, or planned.
Type	The category of medical education event being offered.

Inviting Professionals to MedEd Events Using Pharma Handheld

When you have scheduled a MedEd event and have decided what sessions will be offered, you can invite health care professionals to attend.

To invite a contact to a MedEd event

- 1 Navigate to the MedEd screen.
- 2 From the Show drop-down list, select Invitees.
- 3 Tap the Contacts list to select it.
- 4 On the toolbar, select the New Record button.
- 5 In the new row, complete the fields.

Some of the fields are described in the following table.

Field	Comments
First Name	Completed based on the last Name selection.
Last Name	The contact/invitee. Select from the Pick Contact list.
Invitee Status	Indicates whether the invitee has confirmed attendance, is on a wait list, and so on. Pending is the default value.
Role	Describes the selected contact's role at the session.

Creating Expense Reports in Siebel Pharma Handheld

You can track expenses and create expense reports using Pharma Handheld.

To create an expense report

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expense Reports.
- 3 On the toolbar, tap the New Record button.
- 4 In the new row, complete the necessary fields.
- 5 From the Show drop-down list, select More Info to view additional fields.

NOTE: You must complete the Submit To field or you will get an error message and your expense report will not be saved.

To add detailed line items

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expense Reports.
- 3 In the Expense Reports list, drill down on the Name hyperlink.
- 4 Tap the Line Items list to select it.
- 5 On the toolbar, tap the New Record button.
- 6 In the new row, complete the necessary fields.

You can enter Line Items whose Start or End Date is outside of the Expense Report period.

- 7 Repeat Step 4 through Step 6 to add line items.

A Troubleshooting

This appendix addresses some of the common issues faced while deploying Siebel Handheld. The appendix presents troubleshooting tips in three areas:

- Installation
- Performance
- Log Files

The audience for this appendix is Siebel database administrators, system administrators, and application administrators.

- ["Installation" on page 183](#)
- ["Synchronization" on page 184](#)
- ["Log Files" on page 186](#)
- ["SQLTrace" on page 188](#)
- ["End User Error Messages" on page 189](#)
- ["Web Server Timeout Errors" on page 189](#)
- ["Handheld Device Timeout Errors" on page 190](#)
- ["Performance" on page 190](#)

Installation

Siebel Handheld supports a specific and limited set of devices, handheld OS, desktop OS, server OS, server databases, and languages. This range of devices and platform support varies widely across the range of Siebel Handheld releases and must be carefully checked to confirm support. See *System Requirements and Supported Platforms* on Siebel SupportWeb for your Siebel application for information on supported Handheld OS, desktop OS, server OS, and server databases.

Client Installation, Backup, and Restore

If you encounter problems while installing the Siebel Handheld application on client devices from a desktop PC, refer to the following checklist. Most installation problems are covered by this checklist.

- Confirm that the device is certified and supported. Refer to *System Requirements and Supported Platforms* on Siebel SupportWeb.
- Confirm that the device has 64 MB or higher of RAM with the majority of it available for the Siebel Handheld application.
- Make sure an ActiveSync connection is running (green icon). If not, check your computer to make sure that the serial or USB port is activated and functioning correctly.

- If previous versions of Siebel Handheld were installed on the device, make sure you uninstall the application. See [“Uninstalling the Siebel Handheld Application” on page 124](#).

Siebel Handheld binaries may also be installed to a CompactFlash card to conserve (RAM) memory. The application will still be loaded into memory when it executes. To install on the CompactFlash card, set the ApplicationBinariesLocation and ApplicationDataLocation parameters in the setup.ini file. See [“Setting Up Siebel Handheld Application Installation on a CompactFlash Card” on page 107](#).

Siebel Handheld (application only - no data) may also be copied onto a CompactFlash card to aid in deployments. The initial backup image should be made of a device that has *not* done an initial synchronization. An initial synchronization will still be required by each user to receive the configuration and data. For information on backup utilities, see the documentation accompanying your handheld device.

It is also possible to back up Siebel Handheld on a PC using the Backup/Restore feature within ActiveSync.

Synchronization

Synchronization problems can be caused by incorrect settings in the Siebel Handheld setup.ini or .cfg files. Be sure that application names, data sources, and .srf files are correct.

Make sure to set the SyncURL setting in the client setup.ini file for all synchronization methods. Also, be sure to grant the user visibility to these views in the Administration - Application > Responsibilities view.

NOTE: Check the log files and confirm the accuracy of the generated connect string.

Companion Sync Checklist

Use the following list to troubleshoot problems you encounter using Companion Sync.

- Is the latest version of ActiveSync (version 3.5 or later) installed and running?
- Is ActiveSync connected (green icon)?
- Do you have the correct data source defined in the handheld .cfg file?
- If you have problems logging in, check to make sure that you can use the same credentials to log into the desktop client.
- Remember to keep a 1:1 ratio of users to devices. Only a single user may log in to sync each device. Failure to do so causes data corruption.

When using a SRF with a custom configuration and the sync error occurs during initialization, follow the steps below to troubleshoot problems:

To troubleshoot Companion Sync configuration errors

- 1 Add HandheldSyncLogLevel = 5 to the [pda] section in the .cfg and look for more error details in the CompSync log.

- 2 Use the Validate function in Siebel Tools to look for a configuration error.
- 3 Remove handheld views from user responsibility until synchronization passes the error point.
- 4 Remove DefaultBusObjs from Administration - Mobile > Application Administration > Settings until synchronization passes the error point.

Direct Server Sync Checklist

Use the following checklist to troubleshoot problems you encounter using Direct Server Sync.

- Did you install all client and server components successfully?
- Is there a PDA object manager (OM) running on the Siebel Server?
- Did you bounce the IIS, SWE, and Siebel Server after installation?
- Do you have network access to the URL for DSS? Can you ping the IIS server from inside and, if applicable, from outside the firewall?
- Can you successfully run a SWE command?
- Do you have the correct SyncURL defined in the setup.ini file?
- Is the network connection working from the device? Try Pocket Internet Explorer.
- If you have problems logging in, check to make sure that you can use the same credentials to log into the desktop client.
- Remember to keep a 1:1 ratio of users to devices. Only a single user may log in to sync each device. Failure to do so causes data corruption.

When using a SRF with a custom configuration and the sync error occurs during initialization, follow the steps below to troubleshoot problems:

To troubleshoot Direct Server Sync configuration errors

- 1 Turn on Handheld Sync logging to 5 and look for more error details in the Siebel Handheld Synchronization OM log. For more information, see [“Configuring Direct Server Sync Logging Levels” on page 98](#).
- 2 Use the Validate function in Siebel Tools to look for a configuration error.
- 3 Remove handheld views from user responsibility until synchronization passes the error point.
- 4 Remove DefaultBusObjs from Administration - Mobile > Application Administration > Settings until synchronization passes the error point.

Re-synchronizing Problems

Generally if, for whatever reason, synchronization is terminated, the end user is prompted with a message and the synchronization process ends. In this situation the synchronization session is allowed to close. However, if the connection with the server is unintentionally broken, the session may not have a chance to close before the connection is broken. Therefore, if the end user tries to immediately synchronize again, he may get an error message and may not be able to synchronize. Should this occur, the end user should wait for a period of time (generally, 15 minutes) to allow the session to time out and terminate. Once the session terminates, the end user should be able to synchronize again.

Log Files

This section includes the following topics:

[“Direct Server Sync Log and Output Files” on page 186](#)

[“Companion Sync Log and Output Files” on page 187](#)

[“Handheld Device Log” on page 187](#)

Direct Server Sync Log and Output Files

The name of the Direct Server Sync Log is the OM name plus the task ID for that log session. The log is found in the log subdirectory under the Siebel root directory. Depending on the amount of detail enabled, this file can give a good perspective of what has happened during synchronization regarding the Siebel OM.

To assist Siebel Technical Support, collect the following files when logging a Siebel Handheld service request. The following files are found on the machine where Siebel Server is installed:

- All server sync user files in the *Siebel Root\siebsrvr\hhsync\application directory\user id\node id* directory.
- Server application event log extract.
- Server system event log extract.
- All files in the *Siebel Root\siebsrvr\log* directory including *CompName_task.log*.
where *CompName* is the name of an application server component, and *task* is a Siebel task number. Each sync session is assigned a new Siebel task, so there will be many of these. An example "CompName" value is "SalesCE_enu" (note that language is part of the component name itself).
- All files from all subdirectories under the *Siebel Root\siebsrvr\logarchive* directory.
- Server perfmon log files (showing memory, network, disk performance), if available.

The following files are found on the machine where the Web Server (that is, IIS) is installed:

- SWE log files from *Siebel Root\ieappweb\log* (all files).

- IIS server application event log extract.
- IIS server system event log extract.
- IIS server perfmon log files (showing memory, network, disk performance), if available.

Companion Sync Log and Output Files

The name of the Companion Sync Log is compsync.log. It is found in the log subdirectory under the Siebel root directory. Depending on the amount of detail enabled, this file can give a good perspective of what has happened during synchronization regarding the Siebel object manager.

- *Siebel Root\client\hhsync\application directory\user id\node id* directory.
- NT application event log extract.
- NT system event log extract.
- All files in the *Siebel Root\client\log* directory.
- Perfmon log files (showing memory, network, disk performance), if available.

Handheld Device Log

The siebel_log.txt file is found in the /Program Files/Siebel Handheld directory on the handheld device. It is controlled by reg key DefaultLogLevel, with values 0-4. For more information on values, see [“Siebel Handheld setup.ini Parameters” on page 103](#).

The default value of the reg key during installation is 2. This file logs all of the following:

- Database objects that were imported during synchronization.
- All SQL statements generated by the application. You must set a parameter in the setup.ini file to turn this log on. DefaultLogLevel=3 and 4 will log SQL statements to the device log. See [“Siebel Handheld setup.ini Parameters” on page 103](#) for more information about setting the parameter.
- All system error messages. You must set a parameter in the setup.ini file to turn this log on. DefaultLogLevel=4 will give the most detailed log with debug info. See [“Siebel Handheld setup.ini Parameters” on page 103](#) for more information about setting the parameter.
- All of the messages displayed on the Sync Manager dialog box as well as some basic information about synchronization, such as data source and connect string. You can set the logging level for this file using the DefaultLogLevel parameter in the setup.ini file.

Logging Handheld Synchronization Errors

Siebel Handheld Sync logs all the strings that the user sees in the sync message window as well as many informational messages that do not get displayed in the UI. These informational messages are used to help track down where an error occurred. Siebel Handheld Sync determines which messages get logged based on a value stored in the registry under the key DefaultLogLevel. The values range from 0 to 4; 0 logs all error messages and strings that the user sees, and 4 logs all data that Siebel Handheld Sync sends and receives.

If Siebel Handheld Sync fails, check the siebel_log.txt file immediately after the failure. If you need more detail, increase the logging level of DefaultLogLevel and run Siebel Handheld Sync again. For more information on changing DefaultLogLevel, see [“Siebel Handheld setup.ini Parameters” on page 103](#).

You can determine when and where an error occurs during handheld synchronization by referring to siebel_log.txt and the Handheld Sync Object Manager log.

The device log, siebel_log.txt, shows the last HTTP command that was sent to server, for example, ExecuteLogin, Init, ProcessTransactionEx, ExtractDB, and so on. The Handheld Sync Object Manager log receives the request and invokes the corresponding method.

For example, in the device log (siebel_log.txt), the following indicates that the device is sending an "Init" request to server:

```
INF00x6F46107E03/30/2005 16:58:27http://PPP_PEER:2323/phce/
start.swe?SWExtSource=siebel_pda&SWExtCmd=Init&PatchLevel=7.7.2.2PDA%5b18356_1]
8.471262E-309NU&SyncFormat=CEO&SyncNodeID=&TimeStamp=1112230707

INF00x6F46107E03/30/2005 16:59:20<Init ReturnCode="OK" Complete="100">
```

The server log (Handheld Sync OM log, that is, CompNameObjMgr_enu_XXXXX.log), shows that the "Init" request is received by the server and the "Init" method is invoked:

```
ObjMgrBusServiceLogInvokeMethod402005-03-23 10:45:27Begin: Business Service
'Handheld Synchronization' invoke method: 'Init' at 10c2bc68

HandheldSyncLogDebug502005-03-23 10:45:27Request Init received
```

(Where "CompName" is the server component name of the handheld synchronization for the specific handheld application.)

In addition to the device log, customers should also check the CompSync log in laptop (for Companion Sync) or SalesCEOObjMgr_enu_XXXXX.log in Siebel Server (for DSS). For more information on changing logging levels, see [“Configuring Direct Server Sync Logging Levels” on page 98](#) and [“Configuring Companion Sync Logging Levels” on page 99](#).

SQLTrace

Use SQLTrace for diagnostic purposes if you encounter serious configuration errors or performance problems and cannot otherwise diagnose the problem. The problem may quickly become apparent in the log entries from SQL tracing.

To enable SQL tracing

- 1 Log into srvrmgr prompt.
- 2 At the DOS prompt, run server manager (srvmgr) from the <siebsvr/bin> directory:
`srvmgr /g gateway /e enterprise /u sadmin /p sadmin`
- 3 Run: `change evtI ogl vl Obj MgrSql Log=4 for comp [OMName]`, where [OMName] = the OM name (for example, PhCEObjMgr_enu).
- 4 Log entries are written as described in [“Log Files” on page 186](#).

CAUTION: When SQL tracing is enabled, synchronization is severely and adversely affected. Therefore, it is recommended that you turn SQL tracing on for a limited time to diagnose a specific problem, then turn SQL tracing off.

End User Error Messages

In addition to errors found in the siebel_log.txt file, you might receive a Transaction Errors Reported message during synchronization. These errors are logged in TXNError.hh. The message appears on the handheld device in the Syncmanager Status box. You can double-click the message at any time to see the errors.

You can make the following settings in setup.ini:

TXNErrorLevel = 0 (no log information)

TXNErrorLevel = 1 (report txn errors in the client)

For more information on end-user messages, see [“Synchronization Troubleshooting with the Siebel Handheld Client” on page 138](#).

Web Server Timeout Errors

If synchronization times are long due to the size of the database file or the speed of the network connection, your end users may encounter Web server timeout errors and synchronization failures. First try to resolve this problem by reducing the size of your extract and configuring your server performance. You can reduce the size of the extract by fine-tuning filters, or if appropriate filters have already been defined, select ones that will return less data. If after doing this, your end users continue to experience timeout errors, then increase the timeout parameter on IIS for the default Web Server.

Follow the procedure for your platform to change the timeout parameter.

To change the timeout parameter on Windows

- 1 From the Start menu, select Programs > Administrative Tools > Internet Services Manager.
- 2 From the Internet Information Services window, select the local machine, right-click on the Default Web Site, and select Properties from the pop-up list.
- 3 From the Web Site Properties window, select the Web Site tab.

- 4 Under the Connections heading, locate the Connection Timeout property and increase the number of seconds.
- 5 Click OK.

Handheld Device Timeout Errors

The following three parameters are stored in device registry. They control the device timeout. For more information on device timeout errors, see the following parameters in ["Siebel Handheld setup.ini Parameters" on page 103](#):

- InternetOptionReceiveTimeout = 600000
- InternetOptionSendTimeout = 600000
- InternetOptionDataExtractionTimeout = 600000

Performance

This section discusses ways you can optimize your client performance, server performance, and network performance.

Client Performance

Client performance is affected primarily by the device capability (minimum 206 MHz processor and 64 MB RAM), configuration, and the quantity of data loaded onto the device. In general, screen-to-screen and view-to-view navigation times of 3 to 4 seconds or less should be considered normal.

It is strongly recommended that customers follow these general guidelines to optimize the performance of their handheld applications:

- Keep configuration under 30 views.
- Keep RML file size under 1.75 MB.
- Keep database files (dbfile.txt) under 2 MB.
Use filters as outlined in the Siebel 2000 Handheld Synchronization Technical Note.
- Keep the number of records for each business component under 2,500.
- Avoid installing other applications on the device at the same time.
- Users should synchronize their data frequently.

Additional configuration information can be found in the Siebel Technical Note 405.

The Siebel Handheld client will benefit from periodic closing and restarting the application to release memory consumed by the handheld operating system. Use File > Exit in the menu to exit from the Siebel Handheld application.

If an external VGA driver is or has been loaded on the device in the past and is no longer needed, be sure to unload it, because it is known to have significant performance impacts on handheld devices.

Server Performance

Server performance affects the performance and scalability of Direct Server Sync processes. Customers should engage Expert Services to do a Scalability Review. The following guidelines are general in nature and pertain to the Siebel Handheld Sync components running on a Siebel Server:

- Use Performance Monitor to track memory and processor performance on the Siebel server.
- Make sure that the Servers (IIS, GW, OM and DB) are on the same high speed LAN segment.
- Siebel Handheld Sync components will stress Siebel Server and database performance because of the intensive interactions during large concurrent synchronizations.
- Estimate that 64 MB is used per Siebmtsh.exe instance.
- To calculate the theoretical maximum concurrent users:
 - $\text{Numusers} = \text{Server_Memory} * \text{threads_per_process_ratio} / 64 \text{ MB}$.
- Optimize the Threads per Process Ratio (Max Tasks/Max MT Servers) per Technical Note 405.
- Set Max Tasks=Max. number of concurrent users (for example, 150).
- Set MinMTServers=MaxMTServers (for example, 30 for 5:1 ratio, if this is determined to be appropriate).

To optimize and tune a Siebel DB server:

- Use Performance Monitor to track memory and processor performance on the DB server.
- Turn on SQL tracing and search for long-running SQL calls.
- Estimate 64 MB of RAM for each concurrent user.
- Consider creating indexes to tune the queries (only performed with the assistance of Siebel Expert Services).
- Consider using a RAID 0+1 disk array with an expanded number of spindles to optimize database performance.

NOTE: Make sure that DB Server settings are set to recommended values. Timeouts should be set at the Siebel Server. Be careful that the timeout is set longer than the longest SQL query.

Network Performance

The condition of the network affects Direct Server Sync performance and scalability. In general, a low-latency, high-bandwidth network is preferred with dedicated rather than shared network connections. The following are general network considerations:

- Make sure there is adequate bandwidth throughout the entire round-trip of network packets and estimate where bottlenecks will occur due to high concurrent load. For example, if 50 users are concurrently synchronizing 1 MB each, 50 MB of data must pass through the network. If this data is passing through a single leased 56 KB per second line, then this data will minimally take $500,000 \text{ KB} / 56 \text{ KB/sec} = 8928 \text{ seconds} = 148 \text{ minutes}$. In reality, a 56 KB per second line will offer only 30-40 KB per second average throughput, which causes further bandwidth constraints. Check the total available bandwidth of network providers (private or public ISP).
- Verify that you have low latency lines with ping round trips of less than 1 second (1000 ms) with no dropped packets.

- Verify if roundtrips occur with less than 10 hops.
- Check the actual throughput of network connections by performing simple file transfers with no Siebel software.
- VPN software from third parties accounts for 30 to 60 percent of additional packet overhead because of the encryption.

Network problems can usually be resolved by working with network providers to size network connections and optimize network routing. Consider the use of burst networks, quality of service contracts, private networks, and dedicated modem banks directly into a high-speed LAN environment.

B

Screens and Views

Siebel Handheld Client supports a subset of the screens and views supported by the Siebel Web Client application. Other screens and views can be configured for your Siebel Handheld Client application if they are based on currently supported classes. Application developers and application administrators will find the information in this appendix useful.

If you configure screens and views based on unsupported classes, you may see anomalous results. For information on how to determine the classes used by other screens and views, see *Object Types Reference*.

Screens and Views

The screens and views shipped with the Siebel Pharma Handheld sample application are shown in [Table 37](#).

Table 37. Siebel Pharma Handheld Screens and Views

Screen	View Name on UI
Contacts	My Contacts
Contacts	More Info
Contacts	Private Notes
Contacts	Shared Notes
Contacts	License Numbers
Contacts	Activities
Contacts	Calls
Contacts	Affiliations
Contacts	Best Time to Call
Contacts	Addresses
Contacts	Rx Data
Accounts	My Accounts
Accounts	Shared Notes
Accounts	More Info
Accounts	Private Notes
Accounts	Activities

Table 37. Siebel Pharma Handheld Screens and Views

Screen	View Name on UI
Accounts	Best Times to Call
Accounts	Addresses
Accounts	Calls
Accounts	Affiliations
Accounts	Sales Data
Activities	My Activities
Activities	More Info
Calendar	Daily
Calendar	Weekly
Calendar	Monthly
Calendar	Contact Participants
Calendar	Employee Participants
Calendar	Add/Modify Activity (note: not displayed from the drop-down menu)
Contact Call	Details
Contact Call	Promotional Items
Contact Call	Issues
Contact Call	Samples Dropped
Account Call	Details
Account Call	Attendee
Home Page	Home Page
Personal Lists	Details
Personal Lists	Promotional Items
Personal Lists	Samples
Med Ed	My Med Ed Events
Med Ed	Invitees
Expense Reports	My Expense Reports
Expense Reports	More Info
Expense Reports	Expense Items
Samples	Samples History
Samples	Inventory List

Table 37. Siebel Pharma Handheld Screens and Views

Screen	View Name on UI
Samples Adjustments	Inventory Count
Samples Adjustments	Adjustments
Samples Adjustments	Adj. Details
Samples Receipts	Receipts
Samples Receipts	Receipt Details
Samples Transfers	Transfers
Samples Transfers	Transfer Details
Samples Orders	Orders
Samples Orders	Order Details

C

Business Components and Classes

Siebel Handheld Client supports a subset of the business components and classes supported by the Siebel Web Client application. This appendix lists the supported business components, business component classes, and applet classes.

- [“Supported Business Components for SiebelPharma Handheld” on page 197](#)
- [“Business Component Classes” on page 200](#)
- [“Applet Classes” on page 201](#)

Supported Business Components for SiebelPharma Handheld

Table 38 lists the supported business components for Siebel Pharma Handheld.

Table 38. Siebel Pharma Handheld Business Components

Supported Business Components
Account
Account Contact Affiliation
Account Note
Account Private Note
Action
Action Contact
Action Employee
Admin SEA Field
CSLS Contact Best Times - CE
CUT Address - CE
CUT Address for Account/Contact
CUT Address Inter Table - CE
Com Organization
Contact
Contact Account Affiliation

Table 38. Siebel Pharma Handheld Business Components

Supported Business Components
Contact (All)
Currency
Database Version
Decision Issue
Employee
Employee (MM)
Expense
Expense Item
Expense Item Type
Internal Division
Internal Product
LS Product Indiction
Language Def
List of Values
List of Values Child
List of Values Dynamic
Opportunity
Order Entry - Order Types
Order Entry - Orders
Period
Pharma Account Call - CE
Pharma Address Inter Table - CE
Pharma Area
Pharma Call Decision Issue
Pharma Call Decision Issue - CE
Pharma Call Products Detailed
Pharma Call Products Detailed - CE
Pharma Call Sample Dropped - CE
Pharma Call Signature
Pharma GA Markets
Pharma GA Rx Consumption

Table 38. Siebel Pharma Handheld Business Components

Supported Business Components
Pharma Internal Product
Pharma Inventory Period
Pharma Inventory Period - CE
Pharma ME Event
Pharma ME Event Professional Invitee Inter Table
Pharma Personal Inventory - CE
Pharma Personal Products - CE
Pharma Personal Promotional Items - CE
Pharma Personal Samples - CE
Pharma Product Issue
Pharma Professional Addresses - CE
Pharma Professional Call - CE
Pharma Professional Note
Pharma Professional Position
Pharma Professional Primary Specialty
Pharma Professional Private Note
Pharma Professional State Licenses
Pharma Professional Items Dropped - CE
Pharma Sales Consumption
Pharma Sample And Promo Order
Pharma Sample And Promo Order Item
Pharma Sample Order And Adjustment
Pharma Sample Order And Adjustment Item
Pharma Sample Stocked Lots
Pharma Sample Stocked Products
Pharma Sample Transaction History Item - CE
Pharma Samples
Pharma Signature Disclaimer
Pharma Template Call

Table 38. Siebel Pharma Handheld Business Components

Supported Business Components
Picklist Generic
Picklist Hierarchical
Position
Price List
Query List
Retail Outlet Best Call Time
SIS HH Contact Activity
Shift
Shift Exception
System Preferences
Time Expense Map
Time Zone

Business Component Classes

NOTE: The business component classes for the handheld application are based on the classes for the Web Client. However, in most instances, because of the limitations of the handheld, only the subset of the class functionality that is required for the handheld is supported.

Table 39 lists the supported business component classes for Siebel Pharma Handheld.

Table 39. Siebel Pharma Handheld Business Component Classes

Supported Business Component Classes	
CSSBCAccountSIS	CSSBCPosition
CSSBCAutoProduct	CSSBCPriceList
CSSBCBase	CSSBCProdRev
CSSBCBSampleLot	CSSBCProductDetailed
CSSBCContactSIS	CSSBCPromoItemsDropped
CSSBCDivision	CSSBCSample
CSSBCDocInvoice	CSSBCSampleDropped
CSSBCExpitm	CSSBCSampleInventory
CSSBCExprpt	CSSBCStateModel

Table 39. Siebel Pharma Handheld Business Component Classes

Supported Business Component Classes	
CSSBCFINOppty	CSSBCStateModelState
CSSBCFINSActivity	CSSBCStateTransition
CSSBCHHInventoryPeriod	CSSBCUser
CSSBCHHPharmaCall	CSSBusComp
CSSBCHHSample	CSSCommandShell
CSSBCHHSampleItem	CSSExpenseAutoGenService
CSSBCInventoryPeriod	CSSOMAlarmMgr
CSSBCLineItem	CSSPreferencesService
CSSBCPeriod	CSSQueryExporter
CSSBCPharmaAddress	CSSSIABCOrder
CSSBCPharmaCall	CSSSISOMPricerService
CSSBCPharmaCallComponent	CSSSMCacheService
CSSBCPharmaDisclaimer	CSSTimeSheetAutoGenService
CSSBCPharmaSign	

Applet Classes

You may create additional screens and views for your handheld application. Any new screens and views must be based on classes and business components that are supported for the Pharma Handheld application. Refer to [Table 40](#) for the supported applet classes.

Table 40. Siebel Pharma Handheld Applet Classes

Applet Classes
CSSDurationFrameList
CSSFrame
CSSFrameAcctCall
CSSFrameBase
CSSFrameCECaIAddModify
CSSFrameCEGridDay
CSSFrameCEGridMonth

Table 40. Siebel Pharma Handheld Applet Classes

Applet Classes
CSSFrameCEGridWeek
CSSFrameCEHome
CSSFrameCEMultiPart
CSSFrameList
CSSFrameListBase
CSSFrameListExpitm
CSSFrameListPharmaActivity
CSSFrameListSample
CSSFrameListSampleItem
CSSFrameNewCall
CSSFramePopupCurrency
CSSFrameProfCall
CSSFrameSISAction
CSSFrameSample
CSSSWFrameListPick
CSSSWFrameListTargetAssoc
CSSSWFrameListVisibilityAssoc
CSSSWFrameListVisibilityPick
CSSSubmitFrame

Siebel Pharma Handheld Objects That Should Not Be Modified

Refer to *Configuring Siebel Business Applications* for guidelines on modifying existing objects.

There are certain objects in the Siebel Pharma Handheld Client which should *not* be changed. [Table 41](#) lists these objects.

CAUTION: If these objects are changed, the behavior of the Siebel Pharma Handheld application cannot be predicted

Table 41. Siebel Pharma Objects that Should Not Be Modified

Type of Object	Objects
Business Objects	Action - Account - CE
	Action - Asset - CE
	Action - Contact - CE
	Action - Internal Product - CE
	Action - Service Request - CE
	Asset - Contact - CE
	Asset - FS Inventory Location - CE
	FS Activity Rec Parts & Tools - Order - CE
	FS InvLoc Product - Internal Product - CE
	FS Part Browser - FS Inventory Location - CE
	Line Items - Action - CE
	Line Items - Internal Product - CE
	Order - Asset - CE
	Order - Service Request - CE
	Service Request - Account - CE
	Service Request - Asset - CE
	Service Request - Contact - CE
	Service Request - Internal Product - CE
Business Components	Action - CE
	Service Request - CE
	Hidden Picklists BusComp - CE

D

User Properties

This appendix documents the handheld-specific user properties and methods for the Siebel Handheld application.

CUT Address – CE Business Component

Table 42. User Properties for CUT Address – CE Business Component

CUT Address – CE Business Component		
User Property	Value	Description
Propagate Address BC Fields	City,Postal Code,State,Street,Addresses,Country, Phone#	Specifies the fields that must be updated in the S_ADDR_PER table that are propagated to the inter table. Fields are separated by commas.
Propagate Address Fields To Parent BC	City City CE, Postal Code Postal Code CE, State State CE,Street Address Street Address CE,Country Country CE	<p>Specifies the source and destination fields that are propagated to the parent business component. Source and destination fields are separated by a vertical bar () and the pairs of fields are separated by commas.</p> <p>In the example City City CE, "City" is the source field and "City CE" is the destination field.</p>

Pharma Account Call – CE Business Component

Table 43. User Properties for Pharma Account Call – CE Business Component

Pharma Account Call – CE Business Component			
User Property	Value	Default Value	Description
Cascading Fields	, <i>Field name</i> ,	,Start Date,Start Time,Account Id,Address,Account Address Id,Account State,Duration Minutes,Brick Id,	Specifies fields that must be cascaded to the attendee call. These fields have to be made force active in the child business component. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Must Detail Products	Y or N	Y	Specifies whether a product must be detailed or not before the call can be submitted.
OnlySubmitBy Position	Y or N	Y	Specifies whether the position that entered the record is the only position that can submit the call.
Read Only If Status Synchronized	Y or N	N	Specifies whether the record is Read Only if the call status is "Synchronized."
SubCall Component CE	, <i>Business Component Name</i> ,	Pharma Professional Call - CE	Child business component to which the changes are cascaded. Use business component names as defined in Siebel Tools.
Submit At Handheld Sync	Y or N	Y	Y indicates call should be submitted at sync to create samples transactions and update sample inventory. N will not create any sample transactions.
Template Components	, <i>Business Component Name</i> ,	Pharma Call Products Detailed - CE	Specifies the business components that need to be copied from the call template when a smart call is applied to a call. Use business component names as defined in Siebel Tools.

Table 43. User Properties for Pharma Account Call – CE Business Component

Pharma Account Call – CE Business Component			
User Property	Value	Default Value	Description
Update After Submit	, <i>Field name</i> ,	,Comment,	Specifies fields that are editable after the call is submitted. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Update Status To Synchronized	Y or N	Y	Specifies whether the status of calls downloaded to the handheld is updated to "Synchronized." When the status is "Synchronized," the calls are read-only on the server.
Validate Product Property	Y or N	N	If set to Y, it throws an error during submit if product detail priority is not in a sequential order starting with 1.

Pharma Address Business Component

Table 44. User Properties for Pharma Address Business Component

Pharma Address Business Component		
User Property	Value	Description
Propagate Address BC Fields	City,Postal Code,State,Street Address,Country	Specifies the fields that must be updated in the S_ADDR_PER table that are propagated to the inter table. Fields are separated by commas.
Propagate Address Fields To Parent BC	City City, Postal Code Postal Code, State State,Street Address Street Address, Country Country	Specifies the source and destination fields that are propagated to the parent business component.
Update Inter Table BC Fields	DEA#,DEA Expr	Specifies list of fields that must be updated in the inter table (S_CON_ADDR).
Validate DEA Number	Y or N	Whenever a DEA# is entered, the field value is set only when it is a valid number.

Pharma Professional Call – CE Business Component

Table 45. User Properties for Pharma Professional Call – CE Business Component

Pharma Professional Call – CE Business Component			
User Property	Value	Default Value	Description
Attendee Call Read Only	, <i>Start Date,Start Time,Call Status,SubType,Address,Duration Minutes,Last Name, (default)</i>	,Start Date,Start Time,Call Status,SubType,Address,Duration Minutes,Last Name, (default)	Specifies read-only fields when the call is an attendee call. Use the field names as they are defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Electronic Signature Read Only	, <i>Field name,</i>	,Last Name,Address,Chosen Template,StartDate,CallStatus,Paper Signature,	Specifies fields that are read-only after a signature is taken. Use the field names as they are defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Must Detail Products	Y or N	N	Specifies whether a product must be detailed before the call is submitted.
OnlySubmitBy Position	Y or N	Y	Specifies whether the position that entered the record is the only position that can submit the call.
Paper Reference Number Required	Y or N	Y	Specifies whether the reference number is required or not in order to submit a call with a paper signature.
Paper Signature Read Only	, <i>Field name,</i>	,Call Status,Signature Captured,	Specifies fields that are read-only when Paper Signature is true. Use the field names as they are defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Read Only If Status Synchronized	Y or N	N	Specifies whether the record is Read Only if the call status is "Synchronized."

Table 45. User Properties for Pharma Professional Call – CE Business Component

Pharma Professional Call – CE Business Component			
User Property	Value	Default Value	Description
SRE Professional Types	<i>Professional Type</i>	No default	Specifies a list of professions. Add a comma to the beginning and end of the professional type. An example would be: ,Physician,Central Lab Technician,
SRE Reference Number Required	Y or N	N	Specifies whether a reference number is required before the call can be submitted.
Sample Disbursed Required	Y or N	N	Specifies whether samples must be dropped when the call is submitted.
Template Components	<i>,Business Component Name,</i>	Pharma Call Products Detailed - CE,Pharma Call Sample Dropped - CE	Specifies the business components that need to be copied from the call template when a smart call is applied to a call. Use business component names as defined in Siebel Tools.
Update After Recreate Receipt	<i>,Field name,</i>	,Last Name,Address,Start Date,Comment,Signature Captured,	Specifies fields that are editable when Recreate Receipt is selected. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Update After Submit	<i>,Field name,</i>	,Comment,	Specifies fields that are editable after the call is submitted. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Update Status To Synchronized	Y or N	Y	Specifies whether the status of calls downloaded to the handheld is updated to "Synchronized." When the status is "Synchronized," the calls are read-only on the server.
Validate DEA Number	Y or N	Y	Specifies whether the DEA Number must be validated before the user can sign and submit the call.
Validate DEA Number Expiration	Y or N	Y	Specifies whether DEA Expiration Date must be validated before the user can sign and submit the call.

Table 45. User Properties for Pharma Professional Call – CE Business Component

Pharma Professional Call – CE Business Component			
User Property	Value	Default Value	Description
Validate License Number	Y or N	Y	Specifies whether License Number must be validated before the user can sign and submit the call.
Validate License Number Expiration	Y or N	Y	Specifies whether License Number Expiration must be validated before the user can sign and submit the call.
Validate License Number Status	Y or N	Y	Specifies whether License Number Status must be validated before the user can sign and submit the call.
Validate OK to Sample	Y or N	Y	Specifies whether it is OK to drop a sample to a contact the call.
Validate Product Priority	Y or N	N	If set to Y, it throws an error during submit if product detail priority is not in a sequential order starting with 1.
Validate Professional Profile	Y or N	Y	
Validate Sign Lot Number	Y or N	Y	Specifies whether Lot Number is required before the user can sign.
Validate Submit Lot Number	Y or N	Y	Specifies whether Lot Number is required before the user can submit the call.

Pharma Address Inter Table – CE Business Component

Table 46. User Properties for Pharma Address Inter Table – CE Business Component

Pharma Address Inter Table – CE Business Component			
User Property	Value	Default Value	Description
Validate DEA Number	Y or N	Y	Specifies whether the DEA number must be validated. An example of a valid DEA number is: AA1234563.

Pharma Call Decision Issue – CE Business Component

Table 47. User Properties for Pharma Call Decision Issue – CE Business Component

Pharma Call Decision Issue – CE Business Component			
User Property	Value	Default Value	Description
Template Fields	, <i>Field name</i> ,	Name	Specifies the fields that need to be copied from the call template when a smart call is applied. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.

Pharma Call Products Detailed – CE Business Component

Table 48. User Properties for Pharma Call Products Detailed – CE Business Component

Pharma Call Products Detailed – CE Business Component			
User Property	Value	Default Value	Description
Max Auto Generated Priority	number	3	Maximum number of priorities that are automatically generated.
Skip Conflict Resolution for Duplicate Records	Y or N	Y	Specifies the behavior of Object Manager when it encounters a duplicate record during synchronization. If Y, the Object Manager drops the record from the handheld client and keeps the record on the server.
Template Fields	, <i>Field name</i> ,	Name,Priority,Indication	Specifies the fields that are copied from the call template when a smart call is applied. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.

Pharma Inventory Period – CE Business Component

Table 49. Pharma Inventory Period – CE Business Component

Pharma Inventory Period – CE Business Component			
User Property	Value	Default Value	Description
Maximum Periods	<i>Number</i>	2	Specifies the number of unreconciled periods, including the active period.

Pharma Call Sample Dropped – CE Business Component

Table 50. User Properties for Pharma Call Sample Dropped – CE Business Component

Pharma Call Sample Dropped – CE Business Component			
User Property	Value	Default Value	Description
Signature Body Text Field: 1	<i>Field name</i>	Quantity	Field name that must appear in the signature body text.
Signature Body Text Field: 2	<i>Field name</i>	Name	Field name that must appear in the signature body text.
Signature Body Text Field: 3	<i>Field name</i>	Vendor Name	Field name that must appear in the signature body text.
Skip Conflict Resolution For Duplicate Records	Y or N	Y	Specifies the behavior of Object Manager when it encounters a duplicate record during synchronization. If Y, the Object Manager drops the record from the handheld client and keeps the record on the server.

Table 50. User Properties for Pharma Call Sample Dropped – CE Business Component

Pharma Call Sample Dropped – CE Business Component			
User Property	Value	Default Value	Description
Template Fields	, <i>Field name</i> ,	,Name, Lot Name, Quantity,	Specifies the fields that need to be copied from the call template when a smart call is applied. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.
Update After Recreate Receipt	,Field Name,	,Name, Quantity,	Fields that can be updated after Recreate Receipt.

Pharma Promotional Items Dropped

Table 51. User Properties for Pharma Promotional Items Dropped – CE

Pharma Promotional Items Dropped – CE Business Component			
User Property	Value	Default Value	Description
Template Fields	, <i>Field name</i> ,	,Name, Quantity,	Specifies the fields that need to be copied from the call template when a smart call is applied. Use field names as defined in Siebel Tools. Add a comma to the beginning and end of the field name.

E

Print Tagging Language

This chapter describes the print tagging language that is used to create print templates for your handheld device.

The audience for this appendix is Siebel application developers.

[“Overview of Siebel Handheld Print Tagging Language” on page 215](#)

[“Using Variables in Print Templates” on page 231](#)

Overview of Siebel Handheld Print Tagging Language

You can create the print template file in any text editor.

- Tags are enclosed in angle brackets and identified with the keyword TAG, followed by a colon. For example: <TAG:>
- Parameters are specified with a keyword, followed by an equals sign. Arguments are in uppercase, surrounded by quotation marks. For example, Font = "FONT FACE"
- Values are in uppercase and lowercase, surrounded by quotation marks. For example: Font = "Helvetica"
- Tags may appear in any order in the file. The only required tag is the Title tag.
- Variables within a print template must be uniquely named. Variable names must be one-word strings and spaces are not allowed.

The following tags are used to specify the format of the print output, which applets are included, and the query that is executed:

- Applet—Specifies which applets are used in the document.
- Comment—Adds comments that do not appear in the final document.
- Divider—Adds visual lines to visually separate different parts of the document.
- Footer—Adds information such as page numbers, date, and time.
- Format—Specifies characteristics such as font, boldface, italics, and underline.
- Header—Adds information such as page numbers, date, and time.
- Page Break—Specifies a break in the text, forcing the text that follows to appear on the next page.
- Picture—Adds graphic images to the document.

- Title—Specifies a name for the template that appears in the print job list.

In addition, you may add static text in the print template.

The following print tags allow you to calculate additional information and add it to your reports:

- GetTotal—Calculates the total for a column of data.
- GetField—Gets the value of a field.
- GetCount—Calculates the number of records.

You can also calculate dates and times using the GetDate and GetTime tags, and you can retrieve the value of the registry using GetRegistry.

All of this information is stored in variables that you specify. In addition, you can assign any value to a variable using the SetVariable tag. You can present this information in your report using the Cell and EndofLine tags to create tables of information. See [“Using Variables in Print Templates” on page 231](#) for an example of how variables can be used to present information in print templates.

Applet

Description

Specifies the applet to be printed.

Usage

Any data that appears in your document must be generated from the applets in the view. Therefore, you must create applets that will produce the data required for your document.

Use the Applet tag to specify any number of list or form applets within the template and to locate the applet in your document. In the form view, a maximum of two fields per row are supported.

Syntax

```
<TAG:Applet Name="APPLET NAME" Query="QUERY STRING" Caption="CAPTION"  
Headerdivider="HEADERDIVIDER" Recorddivider="RECORDDIVIDER" Wrap="WRAP">
```

Parameter	Description
TAG:Applet	(Required) Applet tag indicator.
APPLET NAME	(Required) Applet name as defined in Siebel Tools.
QUERY STRING	(Optional) Specifies the query string directly set to the business component supporting the document. If the query string is not specified, the currently active query string in the view is applied to expose the relevant records.

Parameter	Description
CAPTION	(Optional) Specifies whether the captions in the form applets are suppressed. Valid values are TRUE (default) and FALSE. This parameter does not apply to list applets. Column headings in list applets are always enabled.
HEADERDIVIDER	(Optional) Specifies whether a divider is printed below the column heading in list applets. Valid values are TRUE and FALSE (default). This parameter does not apply to form applets.
RECORDDIVIDER	(Optional) Specifies whether a horizontal divider is printed between records in list applets. Valid values are TRUE and FALSE (default). This parameter does not apply to form applets.
WRAP	(Optional) Specifies whether text field values are word wrapped. Valid values are TRUE and FALSE (default). This parameter does not apply to numeric fields.

Example

<TAG: Applet Name="Order List" Headerdivider="TRUE">

Cell

Description

Prints the string stored in STRING or VARIABLE NAME at the specified location on the current line.

Usage

Use the Cell tag to create cells of data in a row in a table. Use it with the EndOfLine tag. If the data exceeds the width of the cell specified by Startat and Endat, it wraps to the next line.

Syntax

<TAG:Cell Startat="START" Endat="END" Name="STRING" Variable="VARIABLE NAME" Align=ALIGNMENT">

Parameter	Description
TAG:Cell	(Required) Required tag indicator.
START	(Required) Specifies the starting point of the cell, expressed as a percentage of the printable page width. For example, if START =10, then the cell starts at the point that is 10% from the left edge of the printable width.
END	(Required) Specifies the end point of the cell, expressed as a percentage of the printable page width. For example, if END=50, then the cell ends at the point that is 50% from the left edge of the printable width.
STRING	(Optional) String value. If Variable is not specified, then String is a required parameter.
VARIABLE NAME	(Optional) Name of variable where the value is stored. If String is not specified, then Variable is a required parameter.
ALIGNMENT	(Optional) Specifies the alignment of the string. Valid values are LEFT (default), CENTER, and RIGHT.

Example

```
<TAG:Divider Weight="3" Startat="20" Endat="80">
<TAG:Cell Startat="0" Endat="50" name="TOTAL:" Align="RIGHT">
<TAG:Cell Startat="50" Endat="100" Variable="vvv1total" Align="RIGHT">
<TAG:EndOfLine>
<TAG:Cell Startat="0" Endat="50" name="TOTAL Defective:" Align="RIGHT">
<TAG:Cell Startat="50" Endat="100" Variable="vvvDefectiveTotal" Align="RIGHT">
<TAG:EndOfLine>
<TAG:Cell Startat="0" Endat="50" name="TOTAL Good:" Align="RIGHT">
<TAG:Cell Startat="50" Endat="100" Variable="vvvGoodTotal" Align="RIGHT">
<TAG:EndOfLine>
<TAG:Cell Startat="0" Endat="50" name="Defective Count:" Align="RIGHT">
<TAG:Cell Startat="50" Endat="100" Variable="vvvDefectiveCount" Align="RIGHT">
<TAG:EndOfLine>
<TAG:Cell Startat="0" Endat="50" name="Good Count:" Align="RIGHT">
```

```
<TAG: Cell Startat="50" Endat="100" Variable="vvvGoodCount" Align="RIGHT">
<TAG: EndOfLine>
<TAG: Cell Startat="50" Endat="100" Variable="vvv3reg">
<TAG: EndOfLine>
<TAG: Cell Startat="50" Endat="100" Variable="vvv5str">
<TAG: EndOfLine>
<TAG: Cell Startat="0" Endat="30" Variable="vvv4date">
<TAG: Cell Startat="30" Endat="70" Variable="vvv4longdate">
<TAG: Cell Startat="70" Endat="100" Variable="vvv8time">
<TAG: EndOfLine>
```

Comment

Description

Adds code comments to the print template.

Usage

Use to add explanatory notes or documentation to explain and maintain the print template. Comment tags are ignored during printing and do not appear in the printed document.

Syntax

```
<REM: COMMENT>
```

Parameter	Description
REM	(Required) Comment tag indicator.
COMMENT	(Optional) Comment text.

Example

```
<REM: Quotation Print Template. This template includes four applets.>
```

Divider

Description

Renders a horizontal line across the width of the page.

Usage

Use to visually separate the different sections of your document. The Divider tag can be used between other tags; therefore, you may add a line between two applets. However, you cannot embed a Divider within an applet.

Syntax

```
<TAG:Divider Weight="WEIGHT" Startat="START" Endat="END">\
```

Parameter	Description
TAG:Divider	(Required) Divider tag indicator.
WEIGHT	(Optional) Specifies line thickness. Valid values are 1–5. The default value is 1, which produces a line 0.2 mm wide. Increasing the value by 1 increases the width by 0.2 mm. A 5 produces a line that is 1 mm wide.
START	(Optional) Percentage that specifies the starting point of the line. The default is 0%, the farthest left point.
END	(Optional) Percentage that specifies the end point of the line. The default is 100%, the farthest right point.

Example

```
<TAG:Divider Weight="2" Startat="20" Endat="80">
```

EndOfLine

Description

Specifies the end of a row and advances to the next line.

Usage

Use to create rows of data in a table. Used with the Cell tag.

Syntax

```
<TAG:EndOfLine>
```

Example

```
<TAG:Cell Startat="0" Endat="50" Name="TOTAL:" Align="RIGHT">
<TAG:Cell Startat="50" Endat="100" Variable="vvv1total" Align="RIGHT">
<TAG:EndOfLine>
```

Footer

Description

Adds footer information such as page numbers, the current date, and the current time.

Usage

You may, for example, always want the text "Thank you for your business!" to appear on the bottom of your receipts. If so, you may include this text in a Footer tag.

The Footer tag may be specified anywhere in the template file; however, it will always appear at the very bottom of your document. Only one Footer tag is applied to the document. If you have multiple Footer tags in the file, only the last Footer tag is used; any other Footer tags are ignored.

If you include a Footer tag in your template, then you must set the BottomMargin in setup.ini to a minimum of 20.

The footer has three sections, Left, Center, and Right, which are used to position the information in the footer.

The text in the footer is formatted in 10 point, Helvetica font. If Helvetica is not available on your system, the default font is used. You cannot customize text formatting of the Footer tag. The Format tag does not affect the formatting of the footer.

Syntax

```
<TAG:Footer Left="DATA" Center="DATA" Right="DATA">
```

Parameter	Description								
TAG:Footer	(Required) Footer tag indicator.								
DATA	(Optional) Static text or one of the following data tags:								
	<table border="1"> <thead> <tr> <th>Data tag</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><page></td> <td>Page number</td> </tr> <tr> <td><date></td> <td>Date of the printing</td> </tr> <tr> <td><time></td> <td>Time of the printing</td> </tr> </tbody> </table>	Data tag	Description	<page>	Page number	<date>	Date of the printing	<time>	Time of the printing
Data tag	Description								
<page>	Page number								
<date>	Date of the printing								
<time>	Time of the printing								

Example

```
<TAG:Footer Left="<date>" Right="<page>">
```

Format

Description

Specifies the characteristics of the text—the typeface or font, whether the text is in boldface, italics, or underlined, and the text alignment.

Usage

The font specification specifies the characteristics of all text that follows the tag until the next Format tag.

The text alignment tag (Align) behaves somewhat differently. When the applet is rendered, the field alignment specification takes precedence over the Align parameter.

Syntax

```
<TAG:Format Face="FONT FACE" Size="FONT SIZE" Bold="BOLD" Italic="ITALIC"
Underline="UNDERLINE" Align="TEXT ALIGNMENT">
```

Parameter	Description
TAG:Format	(Required) Format tag indicator.
FONT FACE	(Required) Specifies the typeface of the text. Any typeface installed on the handheld device may be specified. There is no default for this parameter.
FONT SIZE	(Required) Specifies the text size. Any installed font size for an installed typeface on the handheld device may be specified. There is no default for this parameter.
BOLD	(Optional) Specifies whether the text is in bold. Valid values are TRUE or FALSE (default). If TRUE, text is set to bold.
ITALIC	(Optional) Specifies whether the text is in italic. Valid values are TRUE or FALSE (default). If TRUE, text is set to italic.
UNDERLINE	(Optional) Specifies whether the text is underlined. Valid values are TRUE or FALSE (default). If TRUE, text is set to underline.
TEXT ALIGNMENT	(Optional) Specifies the text alignment. Valid values are LEFT (default), RIGHT, and CENTER.

Example

```
<TAG:Format Face="Helvetica" Size="10">
```

GetCount

Description

Calculates the number of records in the selected rows and assigns this value to a variable.

Usage

Use GetCount to calculate the number of records and print this value in your report.

Syntax

```
<TAG:GetCount Appletname="APPLET NAME" Query="QUERY STRING" Variable="VARIABLE NAME">
```

Parameter	Description
TAG:GetCount	(Required) Required tag indicator.
APPLET NAME	(Required) Name of the applet.
QUERY STRING	(Optional) Search specification for the rows to be included in the row set. If not specified, the current search specification is used. The syntax for the query string is: Field Name Query Statement. You may specify one or more query strings separated by a vertical bar (). For example, Query="Name LIKE 'Sieb*'" "Location LIKE 'H*'"
VARIABLE NAME	(Required) Name of variable where the value is stored.

Example

```
<TAG:GetCount Appletname="CS HH Product Bucket List Applet" Query="Status|Good" Variable="StatusGood">
```

GetDate

Description

Gets the current date, offsets the date by the number of days specified in Dayoffset, and stores the result in a variable.

Usage

Use GetDate to print a specific date in your report.

Syntax

<TAG:GetDate Dayoffset="NUMBER OF DAYS" Variable="VARIABLE NAME" Logformat="DATE FORMAT">

Parameter	Description
TAG:GetDate	(Required) Required tag indicator.
NUMBER OF DAYS	(Optional) Number of days by which the current date is offset. For example, -100 subtracts 100 days from the current date; 100 adds 100 days to the current date. The default is 0.
VARIABLE NAME	(Required) Name of variable where the value is stored.
DATE FORMAT	(Optional) TRUE prints the date in long date format (for example, Monday, February 11, 2002). FALSE prints the short date format (for example, 2/21/02). The default is FALSE.

Example

<TAG:GetDate Longformat="TRUE" Variable="LongDate">

GetField

Description

Gets the value of the specified column of the first row of selected rows and assigns the result to a variable.

Usage

Use GetField to print a value without developing a print applet. Design the query and sort strings so that the desired record is the first record in the selected rows. GetField only allows you to get the value in the first record.

Syntax

<TAG:GetField AppletName="APPLET NAME" Fieldname="FIELD NAME" Query="QUERY STRING" Sort="SORT STRING" Variable="VARIABLE NAME">

Parameter	Description
TAG:GetField	(Required) Required tag indicator.
APPLET NAME	(Required) Name of the applet.
FIELD NAME	(Required) Name of the field or column.
QUERY STRING	(Optional) Search specification for the rows to be included in the total. If not specified, the current search specification is used.

Parameter	Description
SORT STRING	(Optional) Sort specification. If not specified, the current sort specification is used. The syntax is: Field Name [ASC][DESC]. The default is ASC (Ascending). For example: Sort="Account DESC, Date". In the example, the Account field is sorted in descending order, then the date field is sorted in ascending order.
VARIABLE NAME	(Required) Name of variable where the value is stored.

Example

```
<TAG:GetField AppletName="CS HH Product Bucket List Applet" Fieldname="Quantity" Variable="ProdBucketListField">
```

GetRegistry

Description

Gets a value in the registry for Siebel Handheld and assigns it to a variable.

Usage

Use GetRegistry to print the contents of the registry key in your report.

Syntax

```
<TAG:GetRegistry Name="REGISTRY NAME" Variable="VARIABLE NAME">
```

Parameter	Description
TAG:GetRegistry	(Required) Required tag indicator.
REGISTRY NAME	(Required) Value the registry.
VARIABLE NAME	(Required) Name of variable where the value is stored.

Example

```
<TAG:GetRegistry Name="InstallDir" Variable="Registry">
```

GetTime

Description

Gets the current time, offsets the time by the number of seconds specified in Secondoffset, and assigns the result to a variable.

Usage

Use GetTime to print a specific time in your report.

Syntax

```
<TAG:GetTime Secondoffset="NUMBER OF SECONDS" Variable="VARIABLE NAME">
```

Parameter	Description
TAG:GetTime	(Required) Required tag indicator.
NUMBER OF SECONDS	(Optional)Number of seconds by which the current time is offset. For example, -100 subtracts 100 seconds from the current time; 100 adds 100 seconds to the current time. The default is 0.
VARIABLE NAME	(Required) Name of variable where the value is stored.

Example

```
<TAG:GetTime Secondoffset="3600" Variable="Time">
```

GetTotal

Description

Calculates the total for the specified column for all selected rows and assigns the value to a variable.

Usage

Use GetTotal to calculate a column total and display the total in your report.

Syntax

```
<TAG:GetTotal AppletName="APPLET NAME" FieldName="FIELD NAME" Query="QUERY STRING" Variable="VARIABLE NAME">
```

Parameter	Description
TAG:GetTotal	(Required) Required tag indicator.
APPLET NAME	(Required) Name of the applet.

Parameter	Description
FIELD NAME	(Required) Name of the field or column. Specify a field or column with numeric data. If you specify a field with non-numeric data, a 0 is assigned to the variable.
QUERY STRING	(Optional) Search specification for the rows to be included in the total. If not specified, the current search specification is used. The syntax for the query string is: Field Name Query Statement. You may specify one or more query strings separated by a vertical bar (). For example, Query="Name LIKE 'Sieb*'" "Location LIKE 'H*'"
VARIABLE NAME	(Required) Name of variable where the value is stored.

Example

```
<TAG:GetTotal AppletName= "CS HH Product Bucket List Applet" Fieldname="Quantity" Variable="ProdBucketListTotal">
```

Header

Description

Adds header information such as page numbers, the current date, and the current time.

Usage

You may always want the current date and time to appear on your invoices. If so, you may include this information in a Header tag.

The Header tag may be specified anywhere in the template file; however, it always appears at the very top of your document. Only one Header tag is applied to the document. If you have multiple Header tags in the file, only the last Header tag is used; any other Header tags are ignored.

If you include a Header tag in your template, then you must set TopMargin in setup.ini to a minimum of 20.

The header has three sections, Left, Center, and Right, which are used to position the information in the header. The Left parameter aligns the text with the left margin, and the Right parameter right aligns the text with the right margin. The Center parameter centers the text in the header.

The text in the header is formatted in 10 point, Helvetica font. If Helvetica is not available on your system, the default font is used. You cannot customize text formatting of the Header tag. The Format tag does not affect the format of the header.

Syntax

<TAG:Header Left="DATA" Center="DATA" Right="DATA">

Parameter	Description								
TAG:Header	(Required) Header tag indicator.								
DATA	(Optional) Static text or one of the following data tags:								
	<table border="1"> <thead> <tr> <th>Data tag</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><page></td> <td>Page number</td> </tr> <tr> <td><date></td> <td>Date of the printing</td> </tr> <tr> <td><time></td> <td>Time of the printing</td> </tr> </tbody> </table>	Data tag	Description	<page>	Page number	<date>	Date of the printing	<time>	Time of the printing
Data tag	Description								
<page>	Page number								
<date>	Date of the printing								
<time>	Time of the printing								

Example

<TAG:Header Center="Company Confidential">

Page Break

Description

Forces text that follows the tag to appear on the next page.

Usage

Use this for multipage documents or forms.

Syntax

<TAG:PageBreak>

Parameter	Description
TAG:PageBreak	(Required) Page break tag indicator.

Example

<TAG:PageBreak>

Picture

Description

Specifies graphic files included in the print template.

Usage

Use to add graphic images, such as a company logo, to your documents.

The supported file formats are BMP and JPG.

Graphics files are located in the \Program Files\Siebel Handheld\templates directory on the handheld device. Specify the full path name of the file for the Name parameter.

Scaling or graphics operations, such as inverse image, are not supported.

The Alignment and Position parameters are used together to place the graphic. Alignment specifies the left edge, the center, or the right edge of the graphic. Position is distance, specified in millimeters, from the left edge of the paper.

- If Alignment = "Left" and Position="30", then the left edge of the graphic is set 30 millimeters from the left edge of the paper.
- If Alignment = "Center" and Position = "30", the center of the graphic is set 30 millimeters from the left edge of the paper.
- If Alignment = "Right" and Position = "30", the right edge of the graphic is set 30 millimeters from the left edge of the paper.

If Position is not specified, it defaults to 0. Depending on the Alignment setting, the graphic is left-aligned (Alignment = "Left"), the graphic is right-aligned (Alignment = "Right"), or the graphic is centered (Alignment = "Center")

Syntax

<TAG:Picture Name="FILE NAME" Alignment="ALIGNMENT" Position="POSITION">

Parameter	Description
TAG:Picture	(Required) Picture tag indicator.
FILE NAME	(Required) Specifies the full path and name of the graphics file.
ALIGNMENT	(Optional) Specifies the left edge, the center, or the right edge of the graphic. Used with the Position parameter to specify the horizontal position of the graphic. Valid values are LEFT (default), CENTER, and RIGHT.
POSITION	(Optional) Specified in millimeters, it is the distance from the left edge of the paper. Used with the Alignment parameter to specify the horizontal position of the graphic. The default is 0.

Example

<TAG:Picture Name="\Program Files\Siebel Handheld\templates\logo.bmp" Alignment="Right" Position="88">

SetVariable

Description

Sets a value to a variable.

Usage

Use SetVariable to assign a value to a variable. You can then print the value by specifying the variable in the Cell tag.

Syntax

```
<TAG:SetVariable Name="VALUE" Variable="VARIABLE NAME">
```

Parameter	Description
TAG:SetVariable	(Required) Required tag indicator.
VALUE	(Required) A value.
VARIABLE NAME	(Required) Name of variable where the value is stored.

Example

```
<TAG:SetVariable="100" Variable="TotalQuantity">
```

Static Text

You may add static text anywhere in your template by using the current Format settings. The text goes across the entire page width. If it exceeds the width of the page, it wraps to the next line.

Example

This quote is valid for 60 days from the date on this quotation.

Title

Description

Name used to identify the template.

Usage

The Title tag is a required tag in your print template file.

When you print your document, this title appears in the print job list. This title does not appear on the document that is printed. Use static text to add the document title to your template.

Syntax

<TAG:Title Title="TITLE">

Parameter	Description
TAG:Title	(Required) Title tag indicator.
TITLE	(Required) Title text. May be between 1–255 characters.

Example

<TAG:Title Title="Quotation">

Using Variables in Print Templates

The following example shows how to use variables in a print template.

```
<TAG:Title Title="Inventory Report">
<REM: *****Variable Assignment Examples*****>
<TAG:SetVariable name="THIS IS VARIABLE" variable="VarStr">
<TAG:GetRegistry name="Installation" variable="VarReg">
<TAG:GetDate dayoffset="10" variable="VarDate">
<TAG:GetDate longformat="TRUE" variable="VarLongDate">
<TAG:GetTime secondoffset="-3600" variable="VarTime">
<TAG:GetTotal appl etname="CS HH Product Bucket List Applet" fi el dname="Quantity"
variable="VarTotal ">
<TAG:GetTotal appl etname="CS HH Product Bucket List Applet" fi el dname="Quantity"
query="Status|Good" variable="VarGoodTotal ">
<TAG:GetTotal appl etname="CS HH Product Bucket List Applet" fi el dname="Quantity"
query="Status|Defective" variable="VarDefectiveTotal ">
<TAG:GetField appl etname="CS HH Product Bucket List Applet" fi el dname="Quantity"
variable="VarQuantityField">
<TAG:GetCount appl etname="CS HH Product Bucket List Applet" query="Status|Good"
variable="VarGoodCount">
<TAG:GetCount appl etname="CS HH Product Bucket List Applet" query="Status|Defective"
variable="VarDefectiveCount">
<REM: *****Variable Assignment Examples End*****>
<REM: Inventory Print Template. This template includes 3 applets. The ENU template>
<TAG:Format Face="Helvetica" Size="16" Align="Center">
[ Distributor Name
Street Address
City, Country Postal Code
Phone Number Fax Number]
```

```

<TAG: Format Face="Helvetica" Size="20" Bold="TRUE" Align="Center">
Inventory Report
<TAG: Format Face="Helvetica" Size="8" >
<TAG: Applet Name="CS HH Inv Loc Print Applet" Caption="TRUE" Wrap="TRUE">
<TAG: Applet Name="CS HH Product Bucket List Applet" Line="FALSE" Headerdivi der="TRUE"
Recorddivi der="FALSE" Wrap="TRUE">

<REM: *****Variable Usage Example*****>

<TAG: Divider Weight="3" startat="20" endat="80">
<TAG: Cell startat="0" endat="50" name="TOTAL: " Align="RIGHT">
<TAG: Cell startat="50" endat="100" variable="VarTotal" Align="RIGHT">
<TAG: EndOfLine>
<TAG: Cell startat="0" endat="50" name="TOTAL Defective: " Align="RIGHT">
<TAG: Cell startat="50" endat="100" variable="VarDefectiveTotal" Align="RIGHT">
<TAG: EndOfLine>

<TAG: Cell startat="0" endat="50" name="TOTAL Good: " Align="RIGHT">
<TAG: Cell startat="50" endat="100" variable="VarGoodTotal" Align="RIGHT">
<TAG: EndOfLine>

<TAG: Cell startat="0" endat="50" name="Defective Count: " Align="RIGHT">
<TAG: Cell startat="50" endat="100" variable="VarDefectiveCount" Align="RIGHT">
<TAG: EndOfLine>

<TAG: Cell startat="0" endat="50" name="Good Count: " Align="RIGHT">
<TAG: Cell startat="50" endat="100" variable="VarGoodCount" Align="RIGHT">
<TAG: EndOfLine>

<TAG: Cell startat="50" endat="100" variable="VarReg">
<TAG: EndOfLine>

<TAG: Cell startat="50" endat="100" variable="VarStr">
<TAG: EndOfLine>

<TAG: Cell startat="0" endat="30" variable="VarDate">
<TAG: Cell startat="30" endat="70" variable="VarLongDate">
<TAG: Cell startat="70" endat="100" variable="VarTime">
<TAG: EndOfLine>

<REM: *****Variable Usage Example End*****>

<TAG: Divider Weight="2">
<TAG: Format Face="Helvetica" Size="12" Align="LEFT">
Warehouse Signature
<TAG: Divider Weight="2">
<TAG: Format Face="Helvetica" Size="12" Align="RIGHT">

Rep Signature

```


F

Print Configuration Settings

This appendix includes the following topic:

[“Overview of Siebel Handheld Print Configuration Settings” on page 233](#)

Overview of Siebel Handheld Print Configuration Settings

The administrator sets up the default printer setting in the setup.ini file located in the setup directory.

There are a number of parameters to specify printing on the handheld. The parameters specify the following:

- Printer attributes (printer model, port, baud rate, and printer handshake).
- Printing attributes (portrait or landscape orientation, print density and quality, use of compression techniques, and advancing continuous-feed paper).
- Dimensions of the paper (U.S. or European standard paper sizes or custom-size paper).
- Margin settings of the pages (left, right, top, and bottom margins).

These parameters are specified in the [Printing] section of the setup.ini file located in the setup directory. The file contains default settings for all the printing parameters. Review the settings in the file to verify that these settings will work for your printing environment. If necessary, edit the settings as required. You may use any text editor to edit the file.

See [Appendix E, “Print Tagging Language,”](#) for a list of the printing parameters and valid values.

The parameters are set using the following syntax:

```
PARAMETER_NAME = VALUE
```

For example: `PrinterType = 1`

The parameters are listed below in alphabetical order by the parameter name.

MarginBottom

Use the MarginBottom parameter to specify the dimensions of the bottom margin of your page. Specify the margin in millimeters using a whole number; decimal fractions are not valid. The default is 5 millimeters.

The data specified in the Footer tag of the print template is printed in the margin specified by MarginBottom. Therefore, if the print template includes a Footer tag, you must specify a wide enough bottom margin to accommodate the footer. MarginBottom should be set to a minimum of 20 millimeters. For more information, see [“Footer” on page 221](#).

MarginLeft

Use the MarginLeft parameter to specify the width of the left margin of your page. Specify the margin in millimeters using a whole number; decimal fractions are not valid. The default is 5 millimeters.

MarginRight

Use the MarginRight parameter to specify the width of the right margin of your page. Specify the margin in millimeters using a whole number; decimal fractions are not valid. The default is 5 millimeters.

MarginTop

Use the MarginTop parameter to specify the dimensions of the top margin of your page. Specify the margin in millimeters using a whole number; decimal fractions are not valid. The default is 5 millimeters.

The data specified in the Header tag of the print template is printed in the margin specified by MarginTop. Therefore, if the print template includes a Header tag, you must specify a wide enough top margin to accommodate the footer. MarginTop should be set to a minimum of 20 millimeters. For more information, see [“Header” on page 227](#).

PaperHeight

If the paper that your printer uses is not one of the supported standard sizes, then set PaperSize to 5 (custom paper dimensions). Then, specify the height of the paper, in millimeters, using the PaperHeight parameter. You must use a whole number; decimal fractions are not valid. The default is 280 millimeters. If you specify a value of 1–4 for PaperSize, the PaperHeight parameter is ignored.

Use the PaperWidth parameter to specify the width of the paper.

PaperSize

Specify one of the standard paper sizes or specify a custom paper size. (See [Table 52](#).) If you specify custom paper size (5), you must also specify the PaperWidth and PaperHeight parameters. The default is custom paper dimensions.

See also PaperWidth and PaperHeight.

Table 52. Paper Dimensions

Value	Description
1	Letter size (8.5" x 11.5")
2	A4 (210 mm x 297 mm)
3	B5 (176 mm x 250 mm)
4	Legal size (8.5" x 14")
5 (default)	Custom paper dimensions (Specify PaperWidth and PaperHeight parameters.)

PaperWidth

If the paper that your printer is printing to is not one of the supported standard sizes, then set PaperSize to 5 (custom paper dimensions). Then, you must specify the width measurement of the paper, in millimeters, using the PaperWidth parameter. You must use a whole number; decimal fractions are not valid. The default is 5 millimeters. If you specify a value of 1–4 for PaperSize, the PaperWidth parameter is ignored.

Use the PaperHeight parameter to specify the length of the paper.

PrinterBaudrate

Use PrinterBaudrate to specify the speed of the data transmission for the printer. (See [Table 53.](#))

Table 53. Printer Baud Rate

Value	Description
0	Always use 0 for LPT or Network printer ports or for COM ports that communicate with the printer at 4800 baud
1 (default)	9600 baud
2	19200 baud
3	38400 baud
4	57600 baud
5	115200 baud

PrinterCompressed

Use PrinterCompressed to specify the data compression mode. (See [Table 54.](#)) For the printers supported in this release, always set PrinterCompressed to 1.

Table 54. Data Compression

Value	Description
0	No compression techniques used
1 (default)	Use any known compression

PrinterDensity

Use the PrinterDensity parameter to get a lighter or darker output from the printer. Start with the default setting, 2, which corresponds to the printer manufacturer’s default. As you get feedback from the field, you may need to adjust this setting.

The valid values are 0–4 where 0 is the lightest print density, 4 is the heaviest print density, and 2 is average print density.

PrinterDither

Use to specify the method by which different colors are represented. (See [Table 55.](#)) For the printers supported in this release, PrinterDither should always be set to 0.

Table 55. Print Dithering

Value	Description
0 (default)	Use color diffusion
1	Use dithering

PrinterDraftMode

Use PrinterDraftMode to specify the quality of the printing. (See [Table 56.](#)) For the printers supported in this release, PrinterDraftMode should always be set to 0.

Table 56. Print Quality

Value	Description
0 (default)	Use the highest quality printing
1	Use a lower quality printing if available

PrinterFormFeed

Use PrinterFormFeed to specify how paper advances to the next page. (See [Table 57.](#)) If using sheets of paper, set PrinterFormFeed to 0.

Specify 1 or 2 for continuous-feed paper:

- Set PrinterFormFeed to 1 if you do not need to conserve paper or if you want pages of uniform length. The printer scrolls to the length specified by the PageHeight parameter and trims the page there.
- Set PrinterFormFeed to 2 to conserve paper or if it does not matter if your pages are of varying length. In this case, the printer scrolls 25 millimeters beyond the last printed line and trims the page there. The scroll distance, 25 mm, is not customizable.

For both values, 1 and 2, the page length never exceeds PageHeight.

Table 57. Printer Form Feed

Value	Description
0 (default)	Printer sends a form feed command to the printer at the end of each page. Use this setting for sheet paper.
1	Printer scrolls the page to the length specified by the PaperHeight parameter.
2	Printer scrolls the page 25 millimeters past the last printed line of the page.

PrinterHandshake

Use PrinterHandshake to define the serial port handshake. (See [Table 58.](#)) The PrinterHandshake parameter applies only when the printer port is a Com1 or Com2 port. If PrinterPort is set to Com1 or Com2, then set PrinterHandshake to 1.

Table 58. Printer Handshake

Value	Description
0	Uses Xon/Xoff
1 (default)	Uses hardware control lines
2	No handshaking of serial port

PrinterOrientation

Specify whether the paper is to be oriented vertically (portrait) or horizontally (landscape). (See [Table 59.](#)) Not all printers can print in landscape orientation. Therefore, you will need to check the specifications for your printer.

Table 59. Paper Orientation

Value	Description
1 (default)	Portrait (vertical)
2	Landscape (horizontal)

PrinterPort

Specify the port to which the printer is connected with the PrinterPort parameter. (See [Table 60.](#))

If PrinterPort is an LPT port or a network path (2 or 9), then the PrinterBaudrate must be set to 0.

NOTE: The communication port on the printer must be set to be compatible with the host PDA. For IrDA, the serial communication setting must be set correctly to allow reliable printing. You should contact your printer manufacturer and Field Software for more information.

Table 60. Printer Port

Value	Description
0	Com1: serial port
1	Com2: serial port
2	LPT: parallel port
3 (default)	IR Infrared port
4	Com3: serial port
5	Com4: serial port
6	Com5: serial port
7	Com6: serial port
8	Print to file OUTPUT.PRN
9	Print to network address
10	Bluetooth BlueCard solution by Wireless Solutions
11	Socket PNC Bluetooth card support
12	Bluetooth BlueCard solution by Anycom

Table 60. Printer Port

Value	Description
13	Com7: serial port
14	Com8: serial port

PrinterType

Specify the type of printer using the PrinterType parameter. See [Table 61](#) for a list of printers supported by the Printer CE print driver used by the Siebel application.

Table 61. Supported Printers

Value	Description
0	Canon BubbleJet compatible printers
1	Citizen PD-04
2	Citizen PN60i
3	Epson ESC/P 2 compatible printers
4	Epson Stylus compatible printers
5	HP PCL compatible - includes DeskJet and LaserJet
6	Pentax PocketJet 200
7	Pentax PocketJet II
8	Seiko DPU-3445
9	Generic Epson compatible 180DPI 24-pin printers (LQ/ESC)
10	Generic Epson compatible 360DPI 24-pin printers (LQ/ESC)
11	Generic Epson compatible 203DPI 24-pin printers (LQ/ESC)
12	Extech 2"
13	Extech 3"
14	O'Neil MicroFlash
15	DymoCoStar label printers
16	Seiko LabelWriter printers
17	Extech 4"

Table 61. Supported Printers

Value	Description
18	SiPix A6 printer
102	Generic 40 column Dot Matrix Printer
108	Generic 80 column Dot Matrix Printer

Default Printing Settings

The following are the printing parameters from the setup.ini file. The values shown are the default settings.

[Printing]

```

PrinterType= 14
PrinterPort= 3
PrinterBaudrate= 1
PrinterHandshake= 1
PrinterOrientation= 1
PrinterDensity= 2
PrinterCompressed= 1
PrinterDither= 0
PrinterDraftMode= 0
PrinterFormFeed= 0
PaperSize= 5
PaperWidth= 115
PaperHeight= 280
MarginLeft= 5
MarginRight= 5
MarginTop= 5
MarginBottom= 5
    
```


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