



# **Siebel Wireless Administration Guide**

Version 8.0

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# 1

## What's New in This Release

### What's New in Siebel Wireless Administration Guide, Release 8.0

Table 1 lists the changes described in this version of the documentation to support Release 8.0 of the software.

Table 1. Changes in Siebel Wireless Administration Guide, Release 8.0

Topic	Description
<a href="#">"About Siebel Mobile Products" on page 10</a>	This topic provides an overview of the server components, client components, and supported client devices for each mobile product group.
<a href="#">"Supported Markup Languages" on page 13</a>	Support for additional markup languages has been added. Oracle's Siebel Wireless product supports the following markup languages: <ul style="list-style-type: none"><li>■ WML 1.1</li><li>■ WML 1.2</li><li>■ WML 1.3</li><li>■ HTML 3.2</li><li>■ HTML 4.0.1</li><li>■ CHTML</li><li>■ XHTML Basic</li><li>■ XHTML Mobile Profile</li></ul>
<a href="#">"Supported HTML Types for Siebel Wireless" on page 26</a>	Support has been added for the following HTML Types: <ul style="list-style-type: none"><li>■ Checkbox</li><li>■ Textarea</li></ul>
<a href="#">"Verifying and Configuring Siebel Wireless Object Manager Parameters" on page 34</a>	This topic covers verifying and configuring the following Wireless Object manager parameters: <ul style="list-style-type: none"><li>■ MarkupLanguage</li><li>■ Wireless</li><li>■ JavaScript</li></ul>
<a href="#">"Configuring the Number of Records Displayed Per Page" on page 36</a>	This topic covers browser-level configuration of the number of records displayed on each page.

Table 1. Changes in Siebel Wireless Administration Guide, Release 8.0

Topic	Description
<a href="#">“Configuring User Interface Markup Language and Column Rendering” on page 37</a>	This topic covers browser-level user interface configuration. Out-of-the-box support is provided for the following UI rendering: <ul style="list-style-type: none"> <li>■ One column WML</li> <li>■ One column CHTML</li> <li>■ One column XHTML</li> <li>■ Two column HTML</li> </ul>
<a href="#">“Enabling the User Agent Previous Button” on page 39</a>	Support for a previous button has been added. The Previous button is enabled when two column UIs are used.
<a href="#">“Verifying Wireless Configuration with Siebel Tools” on page 39</a>	This topic covers launching the Siebel Wireless Mobile Web Client from Siebel Tools to test Wireless configuration changes.
<a href="#">“Navigating in Siebel Wireless” on page 46</a>	The standard Siebel threadbar has been added to Siebel Wireless applications to allow faster navigation. The Siebel threadbar tracks user navigation and allows reverse navigation from the current view to any previous view.

# 2

## Overview of Siebel Wireless

This chapter provides general background material about Siebel Wireless. It includes the following topics:

- [“About Siebel Wireless” on page 9](#)
- [“About Siebel Mobile Products” on page 10](#)
- [“Siebel Wireless Architecture Overview” on page 12](#)
- [“Supported Markup Languages” on page 13](#)

### About Siebel Wireless

Siebel Wireless brings together wireless communications, the Internet, and Siebel Business Application content to allow organizations to communicate with customers, partners, and employees through a wireless channel. Siebel Wireless applications include:

- Siebel Sales Wireless
- Siebel Service Wireless
- Siebel Partner Relationship Management (PRM) Wireless
- Siebel Self-Service Wireless

Users typically connect to Siebel Wireless by entering the URL in their mobile device's Web browser and bookmarking the site. Users can return to the site any time by selecting the bookmark.

Before using Siebel Wireless, users must authenticate by providing a valid user name and password, just as they would if using another type of Siebel client. Once connected to the database, users interact with the browser-based application by pressing the keys on their mobile device.

Siebel Wireless users can view, edit and create information in their companies' Siebel database. For example, they can:

- Update sales opportunities
- Search for account information
- Access calendar and contact details
- View order and parts status
- Respond to service requests

Siebel Wireless uses the same set of business objects, the same development toolset (Siebel Tools), and the same logical data model as all other Siebel Business Applications. Specifically, Siebel Wireless takes advantage of prebuilt wireless thin client templates and views and Oracle Web-based architecture to deliver wireless access to Siebel content and data.

Siebel Wireless includes the license for Siebel Mobile Connector, through which you can develop additional voice, wireless, and other applications. The Siebel Mobile Connector is a standards-based API delivering well-formed XML from an optimized Siebel application definition. This gives the calling application a definition of user interface and user data in XML format.

Siebel partner and customer application developers can give mobile users real-time or near real-time access to Siebel Business Application information through a variety of mobile devices, access to external data sources, and additional capabilities. For additional details, see [Appendix B, "Siebel Mobile Connector."](#)

## About Siebel Mobile Products

Several mobile applications are included in the Siebel product line. Each serves a different purpose and runs on different devices. Often, these applications complement each other. The mobile applications are as follows:

**Siebel Mobile Web Client and Siebel Remote.** A full-function disconnected client and supporting server-side software, respectively. These applications provide intelligent transaction routing, data synchronization, and Store-and-Forward Messaging capabilities.

**Siebel Handheld.** A full-function disconnected client with data filtering, data synchronization, and Store-and-Forward Messaging capabilities.

**Siebel Wireless.** Siebel applications delivered to client browsers that connect to a Siebel Server through a wireless network.

Figure 1 illustrates the hardware platforms on which these products run.

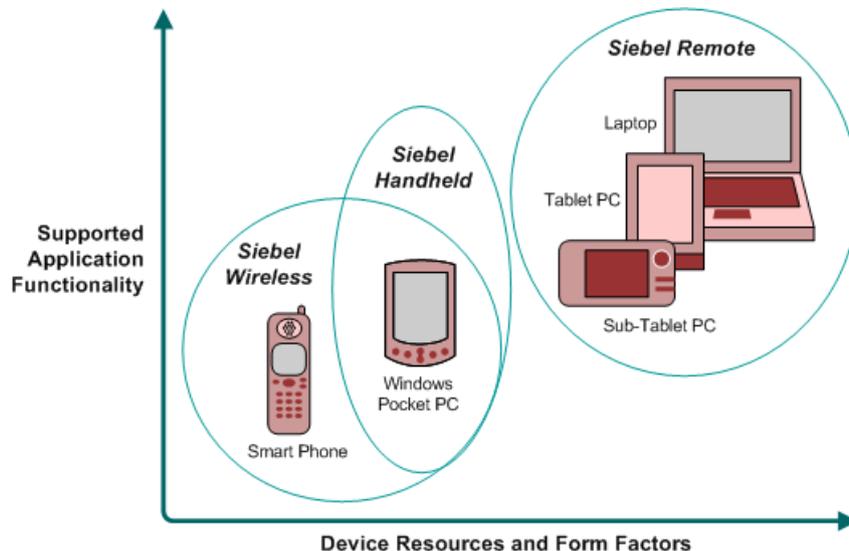


Figure 1. Siebel Mobile Product Platforms

Table 2 describes the Siebel mobile products' software components and supported hardware devices.

Table 2. Siebel Mobile Product Components and Supported Devices

Product Group	Server Components	Client Component	Supported Client Devices
<b>Siebel Remote</b>	Siebel Remote Store-and-Forward Messaging	Siebel Mobile Web Client	Desktop PCs Laptop PCs Tablet PCs
<b>Siebel Handheld</b>	Handheld Synchronization Object Manager Store-and-forward Messaging	Siebel Handheld Client	Windows-based Mobile Devices
<b>Siebel Wireless</b>	Wireless Object Manager	Client Browser	Any mobile device running a supported client browser, including wireless devices and handheld devices

Table 3 describes the Siebel mobile products' supported Siebel applications. It also lists the related documents on your Siebel Bookshelf.

Table 3. Siebel Mobile Product Supported Applications and References

Product Group	Supported Applications	Reference Documents
<b>Siebel Remote</b>	Almost all Siebel Business Applications and Siebel Industry Applications  (Provides the same look and feel as those applications.)	<i>Siebel Remote and Replication Manager Administration Guide</i>  <i>Siebel Store-and-Forward Messaging Guide for Mobile Web Client</i>
<b>Siebel Handheld</b>	Siebel Sales Siebel Field Service Siebel Consumer Goods Siebel eMedical Siebel ePharma	<i>Siebel Sales Handheld Guide</i> <i>Siebel Service Handheld Guide</i> <i>Siebel Consumer Goods Handheld Guide</i> <i>Siebel Medical Handheld Guide</i> <i>Siebel Pharma Handheld Guide</i>  <i>Siebel Store-and-Forward Messaging Guide for Handheld</i>
<b>Siebel Wireless</b>	Siebel Sales Siebel Field Service Siebel Partner Relationship Management Siebel Self-Service Applications	<i>Siebel Wireless Administration Guide</i>

## Siebel Wireless Architecture Overview

Siebel Wireless allows users to read from, write to, and search the Siebel database through a wireless connection between the mobile device and a Web server. During a Siebel Wireless connection, the following components are involved:

- **A Siebel database.** This is the data that Siebel Wireless users access. This database also requires a third-party database server.
- **A Siebel Server, including a Siebel Wireless Object Manager.** These components execute all business logic for the Siebel Wireless application.
- **A Web server and the Siebel Web Server Extension.** This software serves the Siebel Wireless views that are generated as Web pages on the user's wireless browser.

- **A wireless gateway server.** When Siebel Wireless renders Siebel content in WML, a wireless gateway server is necessary to translate data from the Internet protocol (HTTP) to the wireless application protocol (WAP). The WAP gateway server usually binary-encrypts and compresses the data for transport over wireless networks. Host the wireless gateway server by an enterprise behind its firewall, or by an external wireless network operator, or application service provider.
- **A browser-enabled mobile device.** This is a device (often a mobile phone or a personal digital assistant) capable of accessing the Internet wirelessly and displaying Web pages on a wireless browser.

Figure 2 illustrates Siebel Wireless architecture.

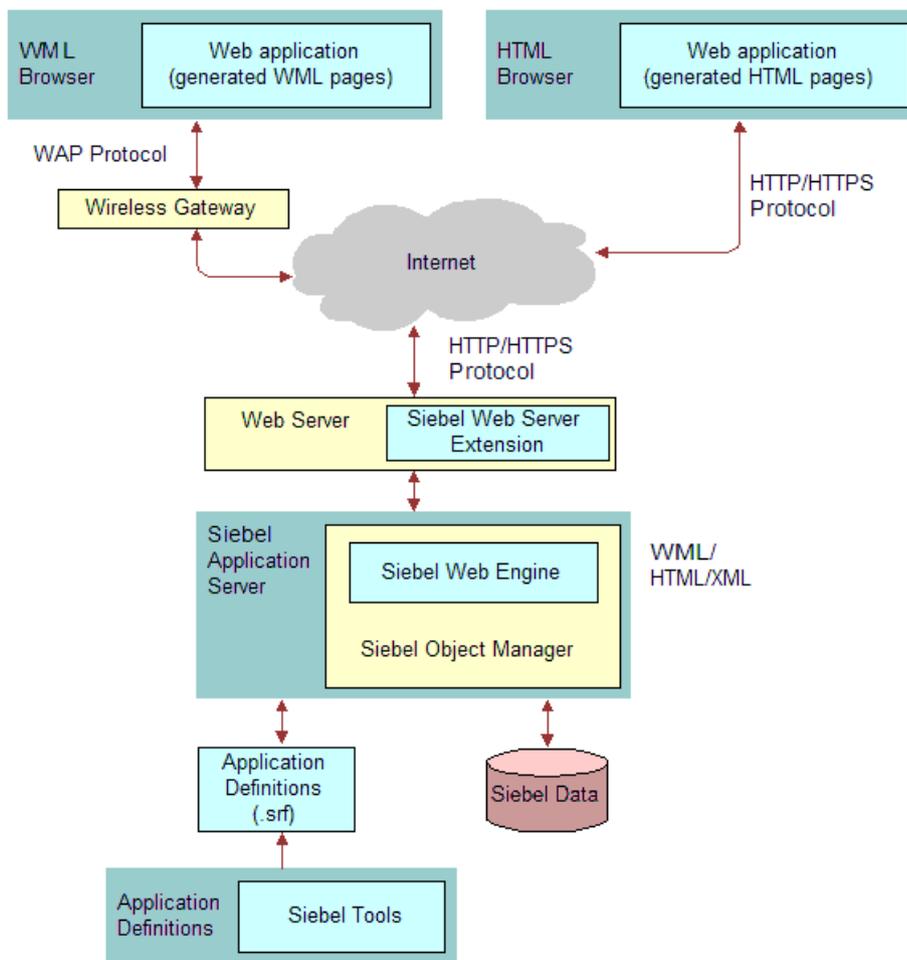


Figure 2. Siebel Wireless Architecture

## Supported Markup Languages

Siebel Wireless provides out-of-the-box support for the following markup languages:

- XHTML Basic

- XHTML Mobile Profile
- WML 1.3
- HTML 3.2

Support for additional languages can be configured via your browser. Siebel Wireless supports the following markup languages:

- WML 1.1
- WML 1.2
- HTML 4.0.1
- CHTML

# 3

## Installing Siebel Wireless

This chapter covers installation of Siebel Wireless. It includes the following topics:

- [“About Installing Siebel Wireless” on page 15](#)
- [“Siebel Wireless Installation Prerequisites” on page 15](#)
- [“Incremental Installation and Configuration of Siebel Wireless” on page 17](#)
- [“Adding Non-Unicode Support for Browsers” on page 20](#)

### About Installing Siebel Wireless

Siebel Wireless applications are separately-licensed Siebel product options integrated into the architecture of Siebel applications, and share the same Siebel Server, tool set (Siebel Tools), and installer as the rest of the Siebel Business Applications suite.

As such, this document focuses on the incremental steps required to enable Siebel Wireless as part of installing the Siebel Business Applications suite, along with setup and configuration considerations specific to the Siebel Wireless product options.

Siebel Wireless generally supports the platforms supported by other Siebel Business Applications. Specific exceptions for Siebel Wireless are noted where appropriate. See *Siebel System Requirements and Supported Platforms* for your Siebel application for general information on supported platforms and installation instructions for Siebel Business Applications.

### Siebel Wireless Installation Prerequisites

Siebel Wireless applications are Siebel product options that you must license separately from other Siebel Business Applications.

In many cases Siebel Wireless applications complement and enhance Siebel Web Client applications. At least one seat of a Siebel Web Client application is required to allow an administrator to administer and maintain Siebel Wireless applications (for additional details, see [“Siebel Web Client Administrator Access” on page 16](#)).

License keys are available for the following Siebel Wireless applications:

- Siebel Sales Wireless
- Siebel Service Wireless
- Siebel PRM Wireless
- Siebel Self-Service Wireless

Before you begin installing Siebel Wireless applications, make sure that you have the appropriate license keys for the number of wireless users that your enterprise plans to support.

## Wireless-Enabled Devices

To use Siebel Wireless applications, a wireless-enabled mobile device with a Web browser and Internet service is required to use Siebel Wireless applications. You can use most mobile devices with WAP/WML 1.1-compliant browsers, and most mobile and pocket HTML browsers with Siebel Wireless.

Through the Siebel Web Browser Administration screen, you can configure support for a variety of wireless browsers.

Follow the instructions that came with your wireless device for getting onto the Web.

## Siebel Web Client Administrator Access

Enterprises using Siebel Wireless must have access to application and server administration functionality through the Siebel Web Client to perform setup configuration tasks required to administer and maintain Siebel Wireless applications.

This access allows systems administrators to perform administrative tasks such as those described in the sections [“Assigning Wireless Responsibilities to Users”](#) on page 18 and [“About Tuning Performance and Scalability of Siebel Wireless”](#) on page 20.

## Setting Up Web Servers to Support WML MIME Types

Siebel Wireless supports wireless-enabled devices with WAP/WML browsers, and also mobile and pocket HTML browsers.

To support WAP/WML browsers, Siebel Wireless requires that the Web Servers (through which Siebel Wireless traffic is routed) support the following MIME types, shown in [Table 4](#).

Table 4. MIME Types

Associated Extension	Content Type (MIME)
.wbmp	image/vnd.wap.wbmp
.wml	text/vnd.wap.wml
.wmlc	application/vnd.wap.wmlc
.wmls	text/vnd.wap.wmlscript
.wmlsc	application/vnd.wap.wmlscriptc

Refer to the documentation for your Web server for further instructions on where and how to configure support for these MIME types.

## About Establishing an External IP Address

If your Siebel Wireless applications are accessed through external wireless gateway servers outside of your network firewall, you must establish an external IP address to facilitate such external access. You can filter this external IP address to allow only certain originating IP addresses, protocols, and ports to enter the enterprise's router, if desired for security purposes.

Typically, you can grant required access to Siebel Wireless applications by opening only Port 80 in your firewall. For increased security, it is recommended that you create an IP Allow filter for your firewall. This filter should only allow incoming traffic through HTTP Port 80 from the originating IP address of the carrier's wireless gateway to the destination external IP address of your enterprise Web server. Contact your network administrator and your IT security department for more information. Contact your wireless Internet service provider for information on the ports that they require exposed to interact with Siebel Wireless applications.

When Siebel Wireless renders Siebel content in WML, a wireless gateway server is necessary to translate data from the Internet protocol (HTTP) to the wireless application protocol (WAP). For a general discussion of WAP server deployment options, see [Appendix C, "WAP Server Deployment Options."](#)

# Incremental Installation and Configuration of Siebel Wireless

Siebel Wireless applications are separately licensed Siebel product options that are integrated into the Siebel architecture, sharing the same Siebel Server, tool set (Siebel Tools), and installer as the rest of the Siebel Business Applications suite.

This topic focuses on the incremental steps required to enable Siebel Wireless as part of installing Siebel Business Applications, along with setup and configuration considerations specific to the Siebel Wireless product options. Specific installation and configuration steps required to begin using Siebel Wireless are described in the following sections:

- ["Required Server Components for Siebel Wireless" on page 17](#)
- ["Required Siebel Component Groups for Siebel Wireless" on page 17](#)
- ["Assigning Wireless Responsibilities to Users" on page 18](#)
- ["About Tuning Performance and Scalability of Siebel Wireless" on page 20](#)

## Required Server Components for Siebel Wireless

Siebel Wireless applications require the installation of both the Siebel Enterprise Server (including the Siebel Server and the Gateway Name Server) and the Siebel Web Server Extension.

## Required Siebel Component Groups for Siebel Wireless

You must deploy the Siebel Wireless component group within the Siebel Server to gain access to the application functionality.

Deploy the component group during the installation of the Siebel Server, or after installing the Siebel Server. See the *Siebel Server Installation Guide* for the operating system you are using for additional details on deploying component groups after the Siebel Server has been installed.

Siebel Correspondence uses a Siebel Document server to display documents through the Web from other applications, such as Microsoft Word, Microsoft PowerPoint, Lotus WordPro, and Lotus Freelance Graphics. Correspondence in Siebel Wireless requires that a Siebel Document server operate as a host for one instance of the eDocuments component group.

The Siebel Document server supports Windows 2000 and XP platforms.

For information about setting up the document server, see *Siebel Applications Administration Guide*.

## Assigning Wireless Responsibilities to Users

Five responsibilities are defined within the Siebel seed data to support the various Siebel Wireless applications available with Siebel Business Applications. These responsibilities, along with the Siebel Wireless applications for which they were created, are as follows:

- Sales Representative - Wireless (for the Sales Wireless application)
- Field Service Representative - Wireless (for the Service Wireless application)
- Partner Sales Representative - Wireless (for the PRM Wireless application)
- Registered Customer - Wireless (for the Self-Service Wireless application)
- Wireless Administrator (for all Wireless applications)

You can assign these responsibilities to Siebel users using the same procedure through which responsibilities for other Siebel Business Applications are assigned, as described in *Siebel Applications Administration Guide* on the *Siebel Bookshelf*.

### Sales Representative Responsibilities

A user provided with the Sales Representative - Wireless responsibility receives access to the following screens:

- Calendar
- Contacts
- Activities
- Opportunities
- Accounts
- Sales Orders
- Employees
- Correspondence

## **Field Service Representative Responsibilities**

A user provided with the Field Service Representative - Wireless responsibility receives access to the following screens:

- Calendar
- Contacts
- Activities
- SRs
- Accounts
- Service Orders
- Employees

## **Partner Sales Representative Responsibilities**

A user provided with the Partner Sales Representative - Wireless responsibility receives access to the following screens:

- Opportunities
- Accounts
- Service
- Contacts
- Activities
- Cust Quotes
- Cust Orders
- Solutions
- Correspondence

## **Registered Customer Responsibilities**

A user provided with the Registered Customer - Wireless responsibility receives access to the following screens:

- SRs
- Orders
- FAQs
- Assets
- Branch Locator

## Wireless Administrator Responsibilities

The Wireless administrator has access to all of the Siebel Wireless application screens. In addition, the administrator can use the Mobile Devices view in the Administration - Communications screen to establish and edit settings for all mobile devices for all users. For information about the Mobile Devices view, see *Siebel Communications Server Administration Guide*.

## About Tuning Performance and Scalability of Siebel Wireless

Several different parameters for Application Object Manager components that support Siebel Wireless applications impact the performance and scalability achievable by Siebel Wireless applications.

The values of these parameters can be increased or decreased to support different numbers of concurrent users.

For information on setting these parameters, refer to the *Siebel Performance Tuning Guide*.

## Adding Non-Unicode Support for Browsers

Siebel Wireless supports UTF-8 Unicode, a character encoding standard. For those browsers that do not support Unicode, Siebel Wireless supports appropriate local code pages.

You invoke local code pages by setting up a UnicodeSupport=FALSE capability in the Web Browser Administration screen in the Siebel Web client.

### *To add non-Unicode support for a browser*

- 1 In the Siebel Web client, navigate to Administration - Web Browser screen > Browsers view.
- 2 Select the entry for which you want to provide local code page support, or if there is no entry, create one by selecting New Record from the drop-down list.
- 3 With the browser selected, click the Capabilities list.
- 4 If the UnicodeSupport Capability Name appears in the list, select it, click Edit and set the Capability Value=FALSE. Save the record.

- 5 If the UnicodeSupport Capability Name does not appear in the list, click New.

The Add Capabilities dialog box appears. UnicodeSupport may or may not appear on the list of capabilities.

If...	Then...
UnicodeSupport appears in the list	Go to <a href="#">Step 6</a> .
UnicodeSupport does not appear in the list.	Go to <a href="#">Step 7</a> .

- 6 If UnicodeSupport appears in the list, do the following:
- a Select UnicodeSupport in the list and click OK.
  - b In the Capabilities list, select UnicodeSupport, click Edit and set the Capability Value=FALSE.
  - c Save the record.
- 7 If UnicodeSupport does not appear in the list, do the following:
- a Click New.
  - b Enter the following values: Capability Name = UnicodeSupport. Capability Value = FALSE.
  - c Save the record.

## Local Code Pages Supported

Subsequently, wireless applications automatically apply local code pages for each supported language. [Table 5](#) identifies the code page for each language.

Table 5. Code Pages

Language	3-Letter Code	Code Page
Brazilian Portuguese	PTB	ISO-8859-1
Danish	DAN	ISO-8859-1
Dutch	NLD	ISO-8859-1
French (standard)	FRA	ISO-8859-1
German (standard)	DEU	ISO-8859-1
Italian	ITA	ISO-8859-1
Japanese	JPN	SHIFT_JIS
Korean	KOR	KS_C_5601-1978
Spanish (modern sort)	ESN	ISO-8859-1
Swedish	SVE	ISO-8859-1
English	ENU	ISO-8859-1

# 4

## Configuring Siebel Wireless

This chapter covers configuring Siebel Wireless. It includes the following topics:

- [“About Configuring Siebel Wireless” on page 23](#)
- [“Configuring Siebel Wireless with Siebel Tools” on page 23](#)
- [“Configuring Siebel Wireless Template Files and XSL Stylesheets” on page 30](#)
- [“Verifying and Configuring Siebel Wireless Object Manager Parameters” on page 34](#)
- [“Configuring User Agent Capabilities” on page 36](#)
- [“Verifying Wireless Configuration with Siebel Tools” on page 39](#)
- [“Configuring Predefined Queries \(PDOs\) for Siebel Wireless” on page 40](#)

### About Configuring Siebel Wireless

You can use the same tool set (Siebel Tools) and other infrastructure as the rest of the Siebel Business Applications suite, to configure the user interface and behavior of many aspects of the Siebel Wireless applications in order to address your particular business needs.

This topic focuses on three main areas in which you can modify the configuration of Siebel Wireless applications:

- The Siebel Wireless objects defined in Siebel Tools
- The Siebel Wireless template files (including wireless Web templates and XSL stylesheets)
- The Siebel Wireless Object Manager Parameters

The focus of this topic is specifically on configuration considerations for the Siebel Wireless thin client applications. For more general information on configuring Siebel Business applications, see the *Siebel Bookshelf*.

### Configuring Siebel Wireless with Siebel Tools

Siebel Tools is a Siebel product option that allows customers to configure their Siebel Business Applications.

Similar to other Siebel Business applications, Siebel Wireless is defined in Siebel Tools as a series of applications, screens, views, and applets.

Unlike the more complex views of the Siebel Web Client applications, Siebel Wireless views normally contain only one applet each, and each of these applets contains one or two columns of data.

## Views Defined in Siebel Tools

The following are the views that you can define in Siebel Tools:

- Siebel Sales Wireless
- Siebel Service Wireless
- Siebel PRM Wireless
- Siebel Self Service Wireless

## Types of Siebel Wireless Applets and Views

The views and applets for Siebel Wireless applications are different from those defined for their Web Client counterparts, such as Siebel Sales.

Siebel Wireless applets and views generally fall into five types:

- Detail applets and views that display labels and data for a single record.
- List applets and views that display data for multiple records.
- Menu applets and views that contain links so users can select different visibility levels (such as My Opportunities or All Opportunities) in the Siebel Self-Service and PRM Wireless applications.
- Pick applets that allow Siebel Wireless users to create one-to-many associations with other Siebel records (such as picking a single company from the list of companies defined in the Siebel database for an Opportunity).
- Association applets that allow Siebel Wireless users to create many-to-many associations with other Siebel records (such as picking multiple Contacts from the list of Contacts defined in the Siebel database for an Opportunity).

## Naming Conventions for Applets and Views

The names defined in Siebel Tools for the Siebel Wireless applets and views provide information as to which Siebel Wireless application they relate to, what business objects they reference, and which type of view they are. Examples of the naming convention followed by Siebel Wireless applets and views are shown in [Table 6](#).

Table 6. Naming Convention

Product	Application	Screen Business Object	View Business Component	Type	Object
SWLS	Sales	Opportunity	Note	Detail	Applet
SWLS	Service	Account	Contact	Display	View
SWLS		Account		Association	Applet

## About Changing Appearance and Functionality of Siebel Wireless Applications

You can use Siebel Tools to change the appearance and functionality of the base Siebel Wireless applications. For example, you can expose additional information, hide existing information, or change terminology to more closely adhere to your particular business processes. You can also create entirely new Siebel Wireless applets, views, screens, and applications using Siebel Tools.

In some cases, Siebel Wireless applications may display different visibility for an object than is available to users of Siebel Business Applications. For example, the default visibility for Siebel Sales is the records in My Accounts, while the default for Siebel Wireless Sales is the records in All Accounts. You can change the visibility by modifying the Visibility Applet and the Visibility Applet Type for the appropriate view.

The rest of this chapter focuses on considerations when using Siebel Tools, including subsets of various parameters that are supported by Siebel Wireless applications. For more information on these concepts and for detailed general information on using Siebel Tools, refer to *Using Siebel Tools*.

## Supported Classes for Siebel Wireless

Manage the behavior of the applet by picking one of the following C++ classes for the Class parameter of each Siebel Wireless applet. [Table 7](#) lists the supported classes for Siebel Wireless.

Table 7. Supported Classes

Class	Purpose	Comments
CSSFrmAct	Used for the Activity detail applet	
CSSFrame/CSSFrameBase	Used for detail applet	
CSSFrameCalRerouteBase	Used for the Calendar list view	Special class for Siebel Wireless Calendar.
CSSFrameList/CSSFrameListBase	Used for list applet	Pick applets use the CSSFrameListBase class, and association applets use the CSSFrameList class
CSSFrameListFile	Used for Correspondence enclosure display applet	
CSSFrameListFulfillment	Used for Correspondence detail applet	

Table 7. Supported Classes

Class	Purpose	Comments
CSSFrameRerouteBase	Used for detail applet	Special reroute class for Siebel Wireless, based on CSSFrameBase. This class is used for the detail applet if rerouting to a user specified page or view after executing the method WriteRecord, DeleteRecord, ExecuteQuery, NewQuery, OrderAllParts or CommitPartMvmtClient. The page or view name for the control that uses the above methods is specified in the applet <i>Control UserProp</i> in Siebel Tools.
CSSFrameRerouteListBase	Used for list applet	Special reroute class for Siebel Wireless, based on CSSFrameListBase. This class is used for the display applet if rerouting to a user specified page or view after executing the method WriteRecord, DeleteRecord, ExecuteQuery, NewQuery, OrderAllParts or CommitPartMvmtClient. The page or view name for the control that uses the above methods is specified in the applet <i>Control UserProp</i> in Siebel Tools.
CSSSWEFrameSrvclocator	Used in eService service locator display applet	Special class for Service Locator

## Supported HTML Types for Siebel Wireless

The HTML Type specifies the style of each form control or list column for an applet, and is required for Siebel Wireless form applet controls and list columns. HTML Types supported by Siebel Wireless applications include:

- Link
- Label

- Text
- Checkbox
- Textarea
- MakeCall
- FieldLabel

## Supported Methods for Siebel Wireless

The Method Invoked specifies the method invoked by a form control when a button is clicked, for controls where the HTML Type is set to Link. Table 8 shows the methods referenced in the Method Invoked column for Siebel Wireless form controls.

Table 8. Supported Methods

Method	Purpose	Comments
Write record	Commit New or Edit Record	For Reroute class, use control user property: View = "View name to reroute to" (optional)
UndoRecord	Cancel new, edit or delete record	
PickRecord	Pick a record from Pick Applet	Use control user property: FieldType = "Control/List item Name" FieldName = "Field Name"
OrderAllParts	Create auto order for orderable recommended parts	
OnSubmitHTML	Submit Correspondence	
NewRecord	Open new record template to create an new record	
NewQuery	Open query template for a new search	
GotoView	Navigate from a control link to a specified view	Use control user property: View = "View name to navigate to"
GotoPrevious	Calendar uses this method to previous set of appointments	
GotoNext	Calendar uses this method to go to the next set of appointments	
GotoPage	Calendar uses this method to go to the next page of appointments	Use control user property: Page = "Page to navigate to" Siebel Wireless applications only use SWLS Start Page (Main Menu Page)

Table 8. Supported Methods

Method	Purpose	Comments
ExecuteQuery	Execute search	
EditRecord	Open edit template to edit a field	
DeleteRecord	Delete current record	For reroute class, use control user property View = "View name to reroute to" (Optional)
CommitPartMvmtClient	Commit a service activity part tracker	

## Preventing Drop-Down Lists from Displaying a Blank Line in Siebel Wireless

The default Siebel Wireless configuration allows the drop-down list of a field to display a blank line even though the field may be a Required Field. If customers wish to make the field a Required Field and keep this blank line from being displayed in the UI, then use Siebel Tools to add the emptyNotOK attribute to the HTML Attributes property.

## Configuring Drilldown Objects in Siebel Wireless

Drilldown objects can be configured to provide end users with the ability to navigate to the detail for a given object using a hyperlink. For example, a hyperlink on a Service Request number or Account Name. When defining new drilldown objects make sure that the control on which the drilldown is being based is defined with an HTML Type of *Text*. This allows the drilldown object to render correctly.

**NOTE:** If the HTML Type is defined as *Field* the browser will render the script for the hyperlink within the browser rather than providing a link to another view.

## Rerouting Users to Different Views in Siebel Wireless

By default, when a user performs certain actions, the methods called by those actions return the user to the view from which the method was called. This is true for the following methods:

- DeleteRecord
- WriteRecord
- EditRecord
- NewRecord
- ExecuteQuery

For example, when a user chooses the Submit button that calls WriteRecord, Siebel Wireless returns the user to the view on which the Submit button appeared.

You can override this behavior, returning the user to a specified view. You will use Siebel Tools to make changes for each applet.

**To reroute the return view**

- 1 In Siebel Tools, change the applet's Class property.

If...	Then...
The applet is a form.	Set the Class property to CSSFrameRerouteBase.
The applet is a list.	Set the Class property to CSSFrameRerouteListBase.

- 2 At the Control level, create a User Property named View, and set it equal to the name of the view to which you want to return users.

Use this format: `vi ew=vi ew_name`

where `vi ew_name` is the name of the view as it is named in Siebel Tools.

## Detail Applet Control Layout for Siebel Wireless

To accommodate the simple user interface required by wireless devices, Siebel Wireless applets do not display controls in detail views based on the applet's layout in Siebel Tools. Instead, controls are presented in order of their sequence as defined in the Applet Web Template with which the applet is associated.

## Masking Passwords for Siebel Wireless

The login pages of the various Siebel Wireless applications have been defined as Web Pages in Siebel Tools.

By default for these Siebel Wireless login Web pages, the Type parameter for the `_SWEPassword` Web Page Item is set to Password. Thus, the text of Siebel Wireless passwords is displayed on screen as users enter their passwords.

**To present password characters entered by users as asterisks**

- Change the Type parameter for the `_SWEPassword` Web page item to Password.

Consider the devices your users are using. Entering characters from a cell phone keyboard is more difficult than from a personal digital assistant, and most such users need the text confirmation that a particular character is the correct one.

## Configuration of Local Phone Numbers in Siebel Wireless

Remove HTML attributes for phone number fields for non-English versions of Siebel Wireless. This issue is applicable for all non-American English locales.

In the American English version, phone numbers are automatically formatted for users in the WML browser, using format masks in the form of HTML Attributes that are applied to the relevant controls in Siebel Tools. Specifically, digits are required in all places except the first.

These format masks are not localized to accommodate other phone number entry styles, which may result in undesired formatting when entering phone numbers.

The HTML Attributes affecting phone number fields should be removed by administrators to support localized versions of Siebel Wireless. See *Using Siebel Tools* for details on modifying or removing HTML Attributes.

## Configuring Siebel Wireless Template Files and XSL Stylesheets

Siebel Wireless applets and views are associated with a series of wireless template files contained in the siebsrvr/WEBTMPL directory, which is created automatically during the installation of the Siebel Server. These templates govern the presentation of Siebel Wireless data to users and are used to create XML files. The XML files are then transformed to the required markup language through XSL stylesheets.

These wireless templates reference a series of XSL stylesheets. The XSL stylesheets are also contained in the siebsrvr/WEBTMPL directory, and are designed to render Siebel Wireless applications in the required markup language.

The new Web Browser Administration and user agent detection capabilities of Siebel Business Applications are used in two ways by Siebel Wireless applications:

- To apply tags conditionally to only certain recognized browser types. For example, you can configure this capability to apply the enhanced, proprietary tag sets offered by various wireless browsers only to those browsers that support the tags, or to improve the Siebel Wireless user interface for certain wireless browsers.
- To apply XSL stylesheets to recognized browser types when supporting both WML and XML browsers.

## Designing Templates for Siebel Wireless

Siebel Wireless has its own set of templates and stylesheets. Because the screen of a mobile device is small, the templates are designed to display the information in a single column, a single applet for each view.

Display items include anything that can be displayed on the screen, including controls, labels, and field values. The items are displayed on-screen based on the sequence established in Siebel Tools.

When you configure a wireless applet in Siebel Tools, you associate item identifiers with the elements you want to include in the applet. The item identifiers are mapped to predefined control IDs in the template. The item identifiers and the control IDs establish the order in which the elements are displayed.

For example, the portion of a detail applet template for a field label and value looks like this:

```
<swe: for-each count=29 iteratorName="CurrentId" startValue="11">
  <!-- reserved for labels -->
  <swe: control id="swe: CurrentId+100" hintMapType="Control ">
    <swe: this property="Displayname" hintText="Label "/>
  </swe: control >
  <!-- reserved for form items -->
  <swe: control id="swe: CurrentId" hintMapType="FormItem">
    <swe: this property="FormattedHtml" hintText="FormItem"/>
  </swe: control >
</swe: for-each>
```

In this example, the control ID range from 11 to 40 (start at 11 and run 29 times) is reserved for field items. The range 111 to 140 (100 + CurrentId) is reserved for label items. In the template, the control ID for the label (CurrentId+100) appears before the control ID for the field value (CurrentId), so a label item with control ID 111 would be displayed above a field item with control ID 11.

Using Siebel Tools, you can map a field (for example, Account Name) to 11 and the field label (for example, Account) to 111 (100 + 11). When this template is used, the label is displayed first, then the field value. You would associate other field values to 12, 13, and so forth, and associate their labels to 112, 113, and so forth.

You can see the control ID ranges available for each template by reviewing the hint text in the template. The detail applet template, for example, uses control ID 1 for the applet title with data, 100 for the applet title label, 2–10 for control items such as Search, 11–40 for field items, 111–140 for field label items, 41–50 for control items such as Main Menu link, and so forth.

The template files are used to create an XML file, depending on the browser type.

For information about how Siebel templates work, see *Using Siebel Tools*.

## Siebel Wireless Template File Overview

Because Siebel Wireless supports the smaller screen of a mobile phone or device, it uses a different set of templates than do other Siebel Business Applications.

Similar to Siebel Wireless applet names and view names defined in Siebel Tools, all Siebel Wireless templates have names that start with SWLS. As with other Siebel Web Template files, these wireless template files each end with the *swt* suffix.

**NOTE:** Any wireless templates that an administrator may create, in addition to the templates that exist in Siebel Tools, do not have to have a name that starts with SWLS. However, by following this convention you can distinguish the wireless templates from others used for Siebel Web Client applications.

The wireless templates are located in the same directory as all other Siebel Web-based templates (siebsrvr/WEBTMPL). They can be edited in any standard text editor. They include the templates shown in [Table 9](#).

Table 9. Descriptions of the Wireless Templates

Template Filename	Description
SWLSLogin.swt	Login page
SWLSStart.swt	Main Menu page
SWLSListView.swt	Base view containing applets
SWLSListApplet.swt	Display page
SWLSDetailApplet.swt	Detail page
SWLSEdit.swt	Edit, search, update, and data submit page
SWLSError.swt	Error display page
SWLSPickApplet.swt	Pick applet page
SWLSAssocApplet.swt	Association applet page
SWLS* Splash.swt	Application welcome page
SWLSPopupEdit.swt	Edit page within pick applet or association applet
SWLSMakeCall.swt	Enable the Make Call feature from Menu soft key in Openwave browsers
SWLSCalendarListApplet.swt	Calendar display page
SWLSLogoffAck.swt	Logoff display page

## Siebel Wireless XML Web Interface

All markup versions of Siebel Wireless are generated using the Siebel XML Web Interface (sXML), XSL stylesheets and the XSLT business service. The Siebel Web Engine's sXML interface renders Siebel Wireless views and applets in XML.

XSL stylesheets are assigned to the Siebel Web Templates using the swe:xsl-stylesheet tag and are located in the Web template directory. See ["Siebel Wireless XSL Stylesheet File Overview" on page 33](#) for more details on Web templates and XSL stylesheets associated with Siebel Wireless applications.

The resulting XML documents are passed to the XSLT business service, which processes the XML using a referenced XSL stylesheet.

## Siebel Wireless XSL Stylesheet File Overview

In addition to the wireless templates, the siebsrvr/WEBTMPL directory also contains a series of XSL stylesheets used to render Siebel Wireless requests in HTML through the Siebel XML Web Interface. These XSL stylesheets are applied to wireless requests which have been identified to be XML requests.

The XSL stylesheets also have names that begin with SWLS, the filename is appended with the markup language and each stylesheet ends with the suffix *.xsl*. Like the wireless template files, you can use any standard text editor to edit these XSL stylesheets. [Table 10](#) lists the XSL stylesheet files.

Table 10. XSL Stylesheets Descriptions

Template Filename	Description
SWLSLogin_<Markup_Language>.xsl	Login page
SWLSMain_<Markup_Language>.xsl	Main Menu page
SWLSListApplet_<MarkupLanguage>.xsl	Display page
SWLSDetailApplet_<Markup_Language>.xsl	Detail page
SWLSEdit_<Markup_Language>.xsl	Edit, search, update, and data submit page
SWLSError_<Markup_Language>.xsl	Error display page
SWLSPickApplet_<Markup_Language>.xsl	Pick applet page
SWLSAssociationApplet_<Markup_Language>.xsl	Association applet page

Particular XSL stylesheets are referenced in wireless template files using the `swe:xsl-stylesheet` tag. For example:

```
<swe:xsl-stylesheet name=SWLSLogin_wml.xsl mode=process/>
```

Including this tag in a wireless template file results in the `SWLSLogin.xsl` stylesheet being applied to all Siebel Wireless applets and views that are associated with that template. You can use conditional tags to apply variant XSL stylesheets (for example, for other markup languages such as `cHTML`), if these additional XSL stylesheets are maintained within the Siebel software.

## Configuring User Agents in Wireless Template Files

Web Browser Administration allows users to define capabilities and user agents for certain Web browsers which can be acted on using conditional logic within Siebel Web Template files.

Siebel Wireless applications can take advantage of the Web browser administration and conditional logic capabilities of Siebel Business Applications to apply tags or other template-based functionality only to certain recognized browser user agents in the Siebel Wireless template files.

For more information on the logical structure and naming conventions used to apply conditional tags within Siebel Web Template files, see *Using Siebel Tools*.

## Verifying and Configuring Siebel Wireless Object Manager Parameters

The Wireless object manager parameters must be configured correctly to enable Siebel Wireless. You can verify and configure Siebel Wireless object manager parameters through the Siebel Server Manager, which is available on both Windows and UNIX environments. The object parameters for Wireless are MarkupLanguage, Wireless and JavaScript. For information on the Object Manager parameters and the Siebel Server Manager, see *Siebel Server Administration Guide*. The Wireless object manager parameters should be set to the default values as follows:

MarkupLanguage=XML

Wireless=TRUE

JavaScript=FALSE

### *To verify Wireless object manager parameters*

- 1 Start the srvrmgr program by using the following commands:

```
cd \<siebel_server_root>\bin
```

```
svrvmgr /g <gateway> /e <enterprise> /s <server> /u <admin user name>/p <admin password>
```

**NOTE:** You cannot use the Uniform Naming Convention (UNC) in the Siebel Server Manager command when specifying the path and machine names.

After the Siebel Server Manager has started, the prompt changes to `svrvmgr: <server_name>`. The `server_name` parameter appears in the prompt only if you executed the `svrvmgr` program by specifying a Siebel Server using the `-s` flag, or after specifying a Siebel Server using the `set server` command. For a list of some of the `svrvmgr` flags, see the table below.

Windows Flag	UNIX Flag	Parameter	Description	Required
/e	-e	<i>entrpr_server</i>	Siebel Enterprise Server name	Y
/g	-g	<i>gateway_server</i>	Network address of the Siebel Gateway Name Server machine	Y
/h or /?	-h or -?		Prints a help/usage message	N
/p	-p	<i>password</i>	Siebel Server administrator password	Y
/s	-s	<i>siebel_server</i>	Siebel Server name (the default is all servers). Launching <code>svrvmgr</code> using the <code>/s</code> flag connects the program only with that specific Siebel Server. All commands and user authentication are sent only to that Siebel Server. You cannot change the targeted Siebel Server in this mode.	N
/u	-u	<i>username</i>	Siebel Server administrator username  <b>NOTE:</b> The <code>svrvmgr</code> program expects the database to store user names in upper case format. User names are automatically converted to upper case during the authentication process and login issues result if database user names are stored in lower case.	Y

- 2 Type the following command at the `srvrmgr` command prompt:

```
list param <Wireless Parameter Name> for comp <Wireless Component Name>
```

For example, the following command will list the value for the number of records displayed for all browsers that access Wireless Sales:

```
list param NumberOfListRows for comp WirelessSalesObjMgr_enu
```

- 3 Type `exit` at the `srvrmgr` command prompt to exit `srvrmgr`.

### *To configure Wireless object manager parameters*

- 1 Start the `srvrmgr` program by using the following commands:

```
cd \<siebel_server_root>\bin
```

```
srvrmgr /g <gateway> /e <enterprise> /s <server> /u <admin user name>/p <admin password>
```

- 2 Type the following command at the `srvrmgr` command prompt:

```
change param <Wireless Parameter Name>=<Value> for compdef <Wireless Component Name>
```

For example, the following command will change the number of records displayed to five for all browsers that access Wireless Sales:

```
change param NumberOfListRows=5 for compdef WirelessSalesObjMgr_enu
```

- 3 Type `exit` at the `srvrmgr` command prompt to exit `srvrmgr`.

## Configuring User Agent Capabilities

User agent capabilities can be configured for each device at the browser level via the web client Administration - Web Browser screen.

This topic covers the following:

[“Configuring the Number of Records Displayed Per Page” on page 36](#)

[“Configuring User Interface Markup Language and Column Rendering” on page 37](#)

[“Enabling the User Agent Previous Button” on page 39](#)

## Configuring the Number of Records Displayed Per Page

The number of records displayed on each page can be configured at the browser level to suit each device's screen size. The number of records on each page is configured via the `NumberOfListRows` Capability.

**To configure the number of records displayed on each page**

- 1 In the Siebel Web client, navigate to Site Map > Administration - Web Browser screen > Browsers view.
- 2 Select the entry for which you want to configure the number of records displayed on each page, or if there is no entry, create one by selecting New Record from the drop-down list.
- 3 With the browser selected, click the Capabilities list.
- 4 If the NumberOfListRows Capability appears in the list, select it, click Edit and set the Capability Value = <number of records to display per page>. Save the record.
- 5 If the NumberOfListRows Capability does not appear in the list, click New.

The Add Capabilities dialog box appears. NumberOfListRows may or may not appear on the list of capabilities.

If...	Then...
NumberOfListRows appears in the list	Go to <a href="#">Step 6</a> .
NumberOfListRows does not appear in the list.	Go to <a href="#">Step 7</a> .

- 6 If NumberOfListRows appears in the list, do the following:
  - a Select NumberOfListRows in the list and click OK.
  - b In the Capabilities list, select NumberOfListRows, click Edit and set the Capability Value = <number of records to display per page>.
  - c Save the record.
- 7 If NumberOfListRows does not appear in the list, do the following:
  - a Click New.
  - b Set the Capability Name = NumberOfListRows
  - c Set the Capability Value = <number of records to display per page>.
  - d Save the record.

## Configuring User Interface Markup Language and Column Rendering

The markup language and number of user interface columns rendered can be configured at the browser level to suit each device’s screen size. The markup language and number of UI columns is configured via the WirelessStyle Capability.

Table 11 provides a listing of out-of-the-box supported UI configuration and the corresponding WirelessStyle Capability values.

Table 11. UI Rendering, default markup and Capability value

UI Rendering	Default Markup	WirelessStyle Capability Value
One column WML	WML	WML
One column CHTML	HTML	CHTML
One column XHTML	HTML	XHTML
Two column HTML	HTML	2-c HTML

**To configure UI column rendering**

- 1 In the Siebel Web client, navigate to Administration - Web Browser screen > Browsers view.
- 2 Select the entry for which you want to configure column rendering, or if there is no entry, create one by selecting New Record from the drop-down list.
- 3 With the browser selected, click the Capabilities list.
- 4 If the WirelessStyle Capability appears in the list, select it, click Edit and set the Capability Value to the required value. Save the record.
- 5 If the WirelessStyle Capability does not appear in the list, click New.

The Add Capabilities dialog box appears. WirelessStyle may or may not appear on the list of capabilities.

If...	Then...
WirelessStyle appears in the list	Go to <a href="#">Step 6</a> .
WirelessStyle does not appear in the list.	Go to <a href="#">Step 7</a> .

- 6 If WirelessStyle appears in the list, do the following:
  - a Select WirelessStyle in the list and click OK.
  - b In the Capabilities list, select WirelessStyle, click Edit and set the Capability Value.
  - c Save the record.
- 7 If WirelessStyle does not appear in the list, do the following:
  - a Click New.
  - b Set the Capability Name = WirelessStyle.
  - c Set the Capability Value.
  - d Save the record.

## Enabling the User Agent Previous Button

The PreEnabled user agent capability is used to enable the Previous button for backwards navigation. For two column UIs it is recommended to use the Previous button rather than the browser's Back button. To enable the Previous button, the PreEnabled Capability should be set to True.

### To enable the user agent Previous button

- 1 In the Siebel Web client, navigate to Administration - Web Browser screen > Browsers view.
- 2 Select the entry for which you want to enable the Previous button, or if there is no entry, create one by selecting New Record from the drop-down list.
- 3 With the browser selected, click the Capabilities list.
- 4 If the PreEnabled Capability appears in the list, select it, click Edit and set the Capability Value=TRUE. Save the record.
- 5 If the PreEnabled Capability does not appear in the list, click New.

The Add Capabilities dialog box appears. PreEnabled may or may not appear on the list of capabilities.

If...	Then...
PreEnabled appears in the list	Go to <a href="#">Step 6</a> .
PreEnabled does not appear in the list.	Go to <a href="#">Step 7</a> .

- 6 If PreEnabled appears in the list, do the following:
  - a Select PreEnabled in the list and click OK.
  - b In the Capabilities list, select PreEnabled, click Edit and set the Capability Value=TRUE.
  - c Save the record.
- 7 If PreEnabled does not appear in the list, do the following:
  - a Click New.
  - b Enter the following values: Capability Name = PreEnabled. Capability Value = TRUE.
  - c Save the record.

## Verifying Wireless Configuration with Siebel Tools

The Siebel Wireless Mobile Web Client can be launched from Siebel Tools to test Wireless configuration changes. The debug-mode run-time settings are defined in the Siebel Tools Debug tab. See Siebel Tools online help for further information.

**To set up Tools to automatically open the Siebel Web client**

- 1 Choose View > Options.

The Development Tools Options dialog box appears.

- 2 Click the Debug tab.

- 3 Use the information in the following table to define the Run-time start up information.

Field	Example	Description
Executable	Siebel.exe	Name of the executable that is opened in debug mode or automatically opened after the compile process.
CFG file	M:\siebel\bin\w32ud\enu\wpsales.cfg	Name and location of the configuration file for the application.
Browser	C:\Program Files\Internet Explorer\iexplore.exe	By default, the mobile Web client uses IE 5.x, but users can specify a different browser.
Working Directory	M:\siebel\bin\w32ud	The directory that contains the Siebel executable.
Arguments	/h	Opens the watch window that allows you to trace the application and enables local debugging of server scripts.

- 4 Use the information in the following table to define your options under Login information and then click OK.

Field	Example	Description
User name	SADMIN	User name used to log into the test application.
Password	SADMIN	Password to log in to the test application.
Datasource	ServerDataSrc	Local database to which the local Web client connects. Default data source. Values listed depend upon the configuration file specified in the cfg File parameter.

## Configuring Predefined Queries (PDQs) for Siebel Wireless

Predefined Queries (PDQs) are a normal query mechanism of the Web client. They are presented in Siebel Wireless in a limited fashion—that is, they are not present in the Wireless UI, so users are not able to select from various PDQs as they would on the Web client.

The SWLS PDQ is applied to each Business Component for Wireless and is configured to be the default PDQ for Wireless views by means of the User Preferences screen in the Web client. If users want to change the SWLS PDQ from the default query of (All Records), they can do so in the normal PDQ screens for a business object.

For additional information about PDQs, see *Siebel Applications Administration Guide* and *Siebel Fundamentals*.



# 5

## Using Siebel Wireless

This chapter covers using Siebel Wireless. It includes the following topics:

- [“Using the Mobile Device” on page 43](#)
- [“Connecting and Logging Into Siebel Wireless” on page 44](#)
- [“Navigating in Siebel Wireless” on page 46](#)
- [“Entering Text in Siebel Wireless” on page 46](#)
- [“Searching in Siebel Wireless” on page 48](#)
- [“Screens and Views in Siebel Wireless” on page 49](#)
- [“Examples of Common Uses of Siebel Wireless” on page 50](#)

**NOTE:** Siebel Wireless does not support the Back button. In certain cases, clicking the Back button may return an error message. If this error occurs, the user should click on the Main Menu link to return to the main menu of the application.

### Using the Mobile Device

Pressing the input keys on the wireless device or, in the case of some wireless handheld devices, touching links on the screen itself accomplishes these actions:

- Drill down or follow a hyperlink
- Invoke a command (such as Submit or Service Order All) through a hyperlink
- Move from item to item on the screen
- Select an item from a picklist
- Enter text or numerical values
- Edit values

The exact keys you use for various actions depends on the wireless device. The following sections explain some of the most common keys for interacting with the application.

#### Scroll Keys

Siebel Wireless displays labels and data in a single column to eliminate the need for horizontal scrolling. You can use vertical scrolling when using Siebel Wireless, as views can contain more data than can be displayed vertically on the mobile device's screen.

All wireless browser-enabled devices have mechanisms to scroll up and down the screen. Often this mechanism is a pair of *scroll keys* (sometimes called navigation keys by some manufacturers). On phones, these keys are usually located just below the center of the screen: they are used to move up and down through the items on the screen.

Other devices have just a single scroll key with two or four arrows (depending on whether the device allows horizontal scrolling as well).

On some devices, a *scroll dial* serves this function. Turning the dial moves the selection point up or down the screen. Pressing the dial selects the current item.

With other devices, you tap on the appropriate button on the screen to navigate vertically within an application.

For details about how to move from item to item on a particular device, see the device's instruction manual.

## Soft Keys

Wireless browser-enabled devices often provide *soft keys* or buttons that represent commands that change depending on which application the browser is accessing and what part of the application is active.

Usually located at the bottom of the screen, soft keys are the primary way of interacting with the application. Their exact functions change from screen to screen; the current function of each soft key is indicated in text that appears onscreen.

Examples of soft keys that may appear in Siebel Wireless, depending on the capabilities of the wireless browser, include:

- OK or Link, which allows users to select links
- Exit, which allows users to log out of the Siebel Wireless applications
- Menu or Options, which in some cases allows users to navigate to a list of phone numbers displayed in a view and link on one of these phone numbers to place a call. Note that this functionality must be supported by both the wireless browser and mobile device you are using to access Siebel Wireless.

You can also use additional soft keys to access functionality provided by the wireless browser or the device itself, such as returning to the browser's home menu or viewing the browser's help. Although these soft keys may be displayed when accessing Siebel Wireless applications, they are not used by Siebel Wireless itself.

For details on the type and functionality of particular soft keys provided by a device and wireless browsers, see the device's instruction manual.

# Connecting and Logging Into Siebel Wireless

To start using Siebel Wireless, connect to the Siebel Server and log in using your standard Siebel user name and password.

### *To connect to the Siebel Server and log in*

- 1 Enter the URL for Siebel Wireless into the device's browser.

You can get this URL from your Siebel administrator, the person who set up Siebel Wireless for your enterprise. If your device allows it, you can create a bookmark for this URL for future use.

- 2 When prompted for a User ID, enter your standard Siebel user name.
- 3 Use the browser's soft key to choose OK.
- 4 If necessary, scroll down to the Password field.
- 5 When prompted for a password, enter your regular Siebel password.

**NOTE:** Password entry may be case sensitive. For information about switching between lowercase and uppercase letters, see the manual for the device.

- 6 Use the browser's soft key to choose OK.
- 7 Choose the Submit link.

If login is successful, the name and main menu of the appropriate Siebel Wireless application appear.

After you log in, the session is maintained with Siebel Wireless until you log off or until the Siebel Server or the wireless server terminates the session. (The wireless server is configured by the mobile operator or by the administrator.) An incoming or outgoing phone call or loss of coverage should not terminate the Siebel Wireless session.

**NOTE:** Different carriers adhere to different session management rules. For example, with one carrier, users logging in automatically return to the end of their previous session, whereas with another carrier users are returned to the main menu regardless of where they left off in their previous session. Contact your carrier or IT department for more information.

## Logging Out of Siebel Wireless

When you are finished with a Siebel Wireless session, you need to log out. Logging out prevents unauthorized users from accessing Siebel data from the device.

Depending on the type of wireless device you have, logging out closes the Siebel session but keeps an Internet connection active, whereas simply turning off the device terminates both the session and the Internet connection.

### *To log out of a Siebel Wireless session*

- 1 Return to the Main Menu screen.

You can get to the Main Menu by choosing the Main Menu link.

- 2 Scroll down to the bottom of the screen and choose Exit. Depending on the wireless browser you are using, the Exit command may be presented as either a soft key or a link.

## Navigating in Siebel Wireless

This topic covers the Siebel Wireless Threadbar and the Siebel Wireless Previous button.

### Siebel Wireless Threadbar

The Siebel threadbar tracks user navigation and allows reverse navigation from the current view to any previous view. The threadbar element allows users to navigate through the application faster, while always moving 'forward' through the application. The threadbar element is supported out-of-the-box for both one column and two column UIs. To preserve space, the threadbar in Wireless is presented as a drop-down list rather than a hyperlink. The drop-down list displays the previous threads in reverse chronological order, with the oldest thread displayed at the top.

### Siebel Wireless Previous Button

The PreEnabled user agent capability is used to enable the Previous button for backwards navigation. For two column UIs it is recommended to use the Wireless application's Previous button rather than the browser's Back button, as there have been caching and other issues in the past when using the browser back button with Wireless applications. To enable the Previous button refer to [Chapter 4, "Configuring Siebel Wireless"](#).

## Entering Text in Siebel Wireless

You enter text into Siebel Wireless as you normally do on the mobile device, with a few exceptions. This topic lists these exceptions and includes additional tips for entering data.

### General Tips

- If the mobile device has separate modes for digits and letters, be sure you are in the right mode at the right time, depending on the kind of data you are entering.
- On many mobile devices, you enter letters by pressing the appropriate key on the keypad. Some devices offer full 26-key keypads; others require users to press a single key multiple times to enter a letter.
- Other mobile devices offer Graffiti, Tegic, or other text entry mechanisms to enter text into Siebel Wireless applications.

## Capitalization

- By default, all Siebel software (including Siebel Wireless) is case sensitive, though your system administrator may have overridden this default. If you are not careful about entering the correct case, you can experience mismatches between text you enter (such as a search string or your password) and the values stored in the Siebel database. For example, if your password is OpenSesame and you enter opensesame, you will not be able to log in if case sensitivity is turned on. Similarly if case sensitivity is activated, if you search for acme, you will not find Acme or ACME.

Consult with your systems administrator to determine whether the Siebel Wireless applications have been configured to be case-sensitive.

- Some mobile devices automatically capitalize the first letter of each word you enter. Therefore, if you are using such a device and intend a word to be lowercase, you must correct the case. For more information, see the owner's manual for the device.

## Clearing Text

If you make a mistake and want to delete a character, use the clear command provided by the mobile device and browser. For example, the right soft key may work like a backspace key, deleting the character before the cursor.

## Entering Dates

The screen label indicates how to enter dates. For American English versions, for example:

- Use the MMDDYY format when entering a date.
- Slashes are inserted automatically as you enter text when using some wireless browsers. For example, to specify April 18, 2000, enter 041800 and 04/18/00 is displayed on the screen. These slashes are generally not required to enter data into Siebel Wireless.
- You must use all six digits of the MMDDYY format. For example, entering 3/5/73 (rather than 03/05/73 or 030573) produces an error.

## Entering Times

The screen label indicates how to enter times. For American English versions, for example:

- Use the hh:mm A format (where the final A represents A.M., and P represents P.M.) when entering a time.
- Colons are inserted automatically as you enter text when using some wireless browsers. For example, to specify 8 o'clock A.M., enter 0800A and you will see 08:00 AM on the screen.
- You must leave a space between the time and the A (A.M.) or the P (P.M.).

## Entering Phone Numbers

The screen label indicates how to enter phone numbers. When entering a phone number, do not enter any dashes and parentheses. Siebel Wireless automatically inserts these symbols.

- For U.S. and Canadian phone numbers, you must use at least 10 digits (an area code followed by the phone number). Siebel Wireless treats extra digits as an extension. For example, if you enter 51055512004567, x4567 would appear after 510-555-1200.
- For phone numbers outside the US and Canada, precede the number with a plus sign (+). The first digit of the phone number entry fields is alphanumeric by default to allow users to enter the + sign if required. Other digits allow for numeric input where supported by wireless browsers.

## Entering Currency

When entering currency, Siebel Wireless allows you to enter only numbers. Symbols (such as \$), commas, and decimals are automatically added, based on the settings configured for the Siebel Server. In its default configuration, Siebel Wireless allows only whole currency (for example, dollars) and not fractional currency (such as cents) to be entered.

Currency symbols and commas are accepted when you enter the amount, but they are not displayed after the value is entered. A decimal point is required for fractional currency values, and it is displayed after the value is entered. If you mistakenly enter an alphabetic character between two digits in the number, an error message appears on the device with instructions for changing the entry. Alphabetic characters before or after a number are ignored.

## Primary Contacts and Accounts

Using the wireless application, the first account added to a new contact (or the first contact added to a new account) is set to Primary. If a contact or an account has already been designated as Primary, a new contact or account is not designated as Primary. You can change these designations using the Web client, but not using the wireless device.

# Searching in Siebel Wireless

To find items in Siebel Wireless, you need to enter a search string in one or more fields.

Each search string can be one of the following:

- **An exact field value.** For example, if you are searching for contacts with the last name Andrews, enter the string Andrews in the last name field.
- **The start of a field value.** For example, to search for contacts with last names starting with A, enter A in the last name field.

Siebel Wireless automatically assumes a wildcard (\*) at the end of the search string to represent 0 or more characters—though not at the end of a date string.

- **Any part of a field value.** You can enter a search string containing as many wildcards as you want. For example, if you remember that an account has the words Home and Store in the name but are not sure of the whole name, enter \*Home\*Store\* in the account field to find all accounts containing this pattern. This pattern would match all of the following values:
  - HomeStore
  - AtHomeStore

- HomeToStore
- HomeToStore, Inc.

## Using a Multifield Search

Siebel Wireless allows you to search for the information you need using multiple fields. For example, you can search for a contact by both first and last name. You are not required to enter search criteria for each available search field. If you leave a field blank, no criteria are considered for that field in the search.

The following procedure is an example of how to use multifield search from the Contacts display view.

### *To use multifield search from the Contact display view*

- 1 Select the Search link on the Contact display view.
- 2 Enter search criteria for Last Name, if desired.
- 3 Click the OK soft key, if required, and enter any desired search criteria for First Name.
- 4 Submit the search by selecting the submit link.

The Contact display view displays contacts with names meeting the search criteria you entered.

## Screens and Views in Siebel Wireless

Siebel Wireless allows you to view a subset of all the information available in Siebel Business Applications.

Siebel applications views have been simplified to fit on the device's small screen. Because of the small screen and the lack of a typing keyboard, the displayed information and the data entry options have been reduced to the information you will need to access when you are mobile. In general, Siebel Wireless views follow these rules:

- The titles for views are in uppercase letters.
- All labels are followed by colons.
- A label that is underlined (or in brackets, depending on the wireless browser you are using) allows you to drill down to edit the value for that label.
- Data is separated from navigation links by a series of four dashes: - - - .
- Data is not followed by colons.
- Data that is underlined (or in brackets, depending on the wireless browser you are using) allows you to select the data (in the case of pick and association applets) or takes you to a detail view for that data.

The screens and views that you have access to depend on the responsibility you have been assigned and the application you are using. For information about user responsibilities, see ["Assigning Wireless Responsibilities to Users"](#) on page 18.

# Examples of Common Uses of Siebel Wireless

This topic gives instructions for tasks you might commonly perform with Siebel Wireless applications:

## ■ Siebel PRM Wireless

- Viewing Service Request (SR) detail and reviewing associated activities and orders
- Viewing quotes and updating opportunities

For an example of using Siebel Wireless PRM, see [“Example of Using Siebel PRM Wireless” on page 50.](#)

## ■ Siebel Self-Service Wireless

- Viewing SR details and product warranty details
- Reviewing Order Status

For an example of using Siebel Self-Service Wireless, see [“Example of Using Siebel Self-Service Wireless” on page 52.](#)

## ■ Siebel Sales Wireless

- Managing the Siebel calendar and updating activities
- Reviewing account details and updating order and opportunity information
- Creating and submitting a correspondence request
- Querying the employee database and calling an employee

For an example of using Siebel Sales Wireless, see [“Example of Using Siebel Sales Wireless” on page 54.](#)

## ■ Siebel Service Wireless

- Managing Service Requests and Orders
- Ordering missing recommended parts
- Creating and tracking field part movements

For an example of using Siebel Service Wireless, see [“Example of Using Siebel Service Wireless” on page 58.](#)

**NOTE:** As described above, the commands required to link and submit changes may vary slightly from browser to browser for these examples.

## Example of Using Siebel PRM Wireless

This example is based on a contract service technician who is assigned to a new service request (SR).

The service technician can:

- Review the service request details and create an activity associated with the service request. See [“To view SR details and create a new activity” on page 51.](#)

- Review opportunities at this account, to take advantage of the call on the account. See [“To view account opportunities” on page 51](#).
- Review a quote during the service call. And, after reviewing the quote, update an opportunity by adding an activity. See [“To review a quote” on page 51](#) and [“To add an activity to an opportunity” on page 52](#).

### ***To view SR details and create a new activity***

- 1 From the Main Menu, select the Service link.  
The My SR display view appears.
- 2 Select the first SR Number link.  
The Service Request detail view appears, showing the account name and a description of the service request.
- 3 Select the Account name and link to it.  
The Account detail view appears showing the address and other account details.
- 4 Scroll down and link to Activities.  
The Activities view displays activities for this account.
- 5 Select the New link, and create a new activity for this account.
- 6 Return to the Main Menu by selecting the Main menu link.

### ***To view account opportunities***

- 1 From the Main Menu, select the Accounts link.
- 2 Select My Accounts.
- 3 Select the account you will be calling on to address the service request.  
The Account detail view appears.
- 4 Link to Opportunities.  
The Opportunities for the account are displayed.
- 5 Scroll through the opportunities displayed until you see the one you want, and then link to it.  
The Opportunities detail view opens.
- 6 Link to Contacts.  
The contacts for the opportunity are displayed.

### ***To review a quote***

- 1 From the Main Menu, select the Cust Quotes link.  
The Quote Menu view appears.

- 2 Select the My Quotes link.  
The My Quote display view appears.
- 3 Select the Search link.  
The Search view appears with no data.
- 4 Enter the first two characters of the Quote Name and click the OK soft key.  
The My Quote display view appears with the search results matching your input.
- 5 Select the Quote Name link.  
The Quote detail view appears. Review the information with the partner.
- 6 Write down the opportunity name.
- 7 Return to the main menu by selecting the Main menu link.

#### ***To add an activity to an opportunity***

- 1 From the main menu, select the Opportunities link.
- 2 Select the My Opportunities link.  
The My Opportunity display view appears.
- 3 Select the Search link.  
The Search view appears.
- 4 Select the Opportunity Name link.
- 5 Enter the first three characters of the opportunity name you wrote down in [Step 6 on page 52](#).
- 6 Press the OK soft key and Submit.  
The Opportunity detail view appears.
- 7 Select the Activity link.
- 8 Create a new activity associated with the opportunity.

## **Example of Using Siebel Self-Service Wireless**

This example is based on a customer who has an open service request with a supplier. When a customer service representative begins to work on a customer's service request (SR), the customer service representative changes the status of a customer's SR which triggers Workflow Manager to send an automated alert to the customer's wireless device notifying the customer of the change.

The customer does the following:

- Reviews the details of the SR by accessing the supplier's wireless Web site and searching on the SR number or the name of the SR.

- Upon locating the SR, the customer may open the SR detail view to see the Abstract and the Product associated with the SR. For additional information, the customer can view Updates to the SR to better understand the progress of the SR. See [“To view SR details and product warranty details” on page 53](#).
- Realizing that the Product associated with the SR may no longer be under warranty, the customer navigates to the Assets screen from the Wireless Self-Service Main Menu and uses the Search functionality to locate the Product and drill into the My Products detail view. See [“To see product warranty details” on page 53](#).
- Selects the Warranty hyperlink to view the Warranty details and sees that the Product is under warranty for another 90 days. See [“To review order status” on page 54](#).

### ***To view SR details and product warranty details***

- 1 From the Main Menu, select SRs.  
The SRs Menu view appears.
- 2 Select the My SRs link.  
The My SR display view appears.
- 3 Select the Search link.  
The Search view appears with no data.
- 4 Select the Title link.  
The SR Title Search view appears with no data.
- 5 Enter the SR Title.  
The My SR display view appears with search results matching your input.
- 6 Select the OK soft key.
- 7 Select the first SR # link.  
The Service Request detail view appears with details for the selected SR.
- 8 Write down the name of the product.  
You will use the product name in the next set of example steps.
- 9 Select the Main menu link.  
The Main Menu view appears.

### ***To see product warranty details***

- 1 Go to the Asset detail view by selecting the Assets link on the Main Menu.  
The Asset display view appears with the list of products.
- 2 Select the Search link.  
The Assets Search view appears.

- 3 Enter the first three characters of the product name you wrote down in [Step 8](#) in the previous set of example steps and click the OK soft key.  
The Assets Search view appears with the search string shown below the Product link.
- 4 Select the Submit link.  
The Asset display view appears with the search results matching your input.
- 5 Select the Product Name link that matches the product name that you wrote down in [Step 8](#).  
The Asset Warranty display view appears.
- 6 Select the first Warranty Name link and press the OK soft key.  
The Asset Warranty detail view appears with details for the selected warranty.
- 7 Select the Main menu link to return to the Main Menu.

### ***To review order status***

- 1 From the Main Menu, select Orders.  
The Order Entry Menu view appears.
- 2 Select the My Orders link.  
The Order Entry Contact view appears.
- 3 Select the Search link.  
The Orders Search view appears with no data.
- 4 Select the Order # link.  
The Order # Search view appears.
- 5 Enter the first three characters of the Order number and click the OK soft key.  
The Order Entry Contact view appears with the search results matching user input.
- 6 Select the first Order Number link.  
The Order Entry detail view appears.
- 7 Go to the Order Entry-Line Item display view by selecting the Order Items link.  
The Order Entry-Line Item display view appears with a list of the items in the order.
- 8 Select the Main menu link to return to the Main Menu.

## **Example of Using Siebel Sales Wireless**

This example is based on a sales representative who needs to:

- Manage the Siebel Calendar. See [“To manage the Siebel Calendar and update activities” on page 55](#).
- Update Activities. See [“To add a comment to the activity” on page 55](#).

- Review Account details. See [“To review account details and update order and opportunity information” on page 55.](#)
- Update Order and Opportunity Information. See [“To create a new opportunity” on page 56.](#)
- Create and Submit a Correspondence Request. See [“To create a new correspondence request” on page 57](#) and [“To set the fulfillment center and recipient for the correspondence” on page 57.](#)
- Query the Employee Database and make a call to the employee. See [“To query the employee database and call an employee” on page 58.](#)

### ***To manage the Siebel Calendar and update activities***

- 1 View your calendar by selecting the Calendar link from the Main Menu.  
The Calendar display view appears.
- 2 Navigate to a particular date by selecting the Go to Date link.  
The Calendar Search view appears.
- 3 Enter the desired date and click the OK soft key.  
The Activity detail view appears for the date you entered.
- 4 See if any Contacts exist for the activity by selecting the Contacts link.  
The Contact display view appears.
- 5 Select the New link to add a new Contact to the activity.  
The New Contact Association view appears.
- 6 Select a Contact to add to the activity and click the OK soft key.  
The selected Contact has been added to the Activity and the Activity Contacts view appears.
- 7 Return to the Activity detail view for the activity.

### ***To add a comment to the activity***

- 1 In the Activity detail view, select the Comments link.  
The Activity Comments Edit view appears.
- 2 Enter the desired text of the comment and click the OK soft key.  
The Comment is entered and the Activity detail view appears.
- 3 Select the Main menu link to return to the Main Menu.

### ***To review account details and update order and opportunity information***

- 1 View the account list by selecting the Accounts link from the Main Menu.  
The Accounts display view appears.

- 2 View the details for the particular account by selecting the Account Name.  
The Account detail view appears with the details for the particular account.
- 3 From the Account detail view, view orders by selecting the Orders link.  
The Order display view appears.
- 4 View the details for an order by selecting the Order number.  
The Order detail view appears.
- 5 Change the requested ship date by selecting the Requested Ship Date link.  
The Requested Ship Date Edit view appears.
- 6 Update the Requested Ship Date and click the OK soft key.  
The Order detail view appears with the updated Requested Ship Date information.
- 7 From the Order detail view, select the Account Name link to return to the detail view for the account.  
The Account detail view appears along with the details for the particular account.

### *To create a new opportunity*

- 1 From the Account detail view, select the Opportunities link to see opportunities for the account.  
The Opportunities display view along with the opportunities for the particular account are displayed.
- 2 Create a new opportunity for the account by selecting the New link.  
The New Opportunity Entry view appears.
- 3 Enter the opportunity name and click the OK soft key.  
The Opportunities display view appears along with the updated name of the new opportunity.
- 4 View the detail for the new opportunity by selecting the Opportunity Name link.  
The Opportunity detail view appears.
- 5 Enter a revenue amount for the opportunity by selecting the Revenue link.  
The revenue Edit view appears.
- 6 Enter a revenue number and click the OK soft key.  
The Opportunity detail view appears along with the updated new revenue information.
- 7 Select the Sales Stage link to pick a sales stage for the opportunity.  
The Sales Stage Selection view appears.
- 8 Pick the desired sales stage and click the OK soft key.  
The Opportunity detail view appears and now shows the updated sales stage.
- 9 Select the Main menu link to return to the Main Menu.

### ***To create a new correspondence request***

- 1** View Correspondence Requests by selecting the Correspondence link from the Main Menu.  
The Correspondence display view appears.
- 2** Create a new correspondence request by selecting the New link.  
The Correspondence New Entry view appears.
- 3** Select the Template label, and select the Search link to search for a template.  
The New Entry Template Search view appears.
- 4** Enter the search string for the template name you want and click the OK soft key.  
The New Correspondence view appears along with templates meeting the search criteria.
- 5** Select the template and click the OK soft key.  
The Correspondence detail view appears along with the details of the new correspondence request based on the template you selected.

### ***To set the fulfillment center and recipient for the correspondence***

- 1** In the Correspondence detail view, select the Fulfillment Center link.  
The Fulfillment Center Selection view appears.
- 2** Select the desired fulfillment center and click the OK soft key.  
The Correspondence detail view appears along with the correspondence request details. The fulfillment center is updated to reflect the choice.
- 3** View recipients for this correspondence by selecting the Recipients link.  
The Recipients display view appears.
- 4** Add a new recipient by selecting the New link.  
The New Recipient view appears.
- 5** Select the desired recipient for the correspondence and click the OK soft key.  
The Recipient display view appears along with the selected recipient.
- 6** Return to the Correspondence detail view by clicking Back once.  
The Correspondence detail view appears.
- 7** Submit the correspondence request for fulfillment by selecting the Submit link.  
The Correspondence display view appears along with the correspondence request just created.
- 8** Select the Main menu link to return to the Main Menu.

### *To query the employee database and call an employee*

- 1 View the employee list by selecting the Employees link from the Main Menu.  
The Employee display view appears.
- 2 Search for an employee by selecting the Search link.  
The Employee Search view appears.
- 3 Enter a last name.
- 4 Perform the search by selecting the Submit link.  
The Employee display view appears along with the employee's name.
- 5 View the employee's cell phone number by selecting the employee's name link.  
The Employee detail view appears.
- 6 Select Menu, and link on the cell phone number to call the employee.  
A phone call is placed to the employee.

**NOTE:** Only certain wireless browsers and mobile devices support the ability to make a call as described in this example, such as Openwave browsers running on wireless phones.

- 7 Select the Main menu link to return to the Main Menu.

## Example of Using Siebel Service Wireless

This example is based on a field service worker who needs to:

- Investigate Service Requests and update an associated order line item. See ["To view an order associated with a service request \(SR\)" on page 58](#) and ["To update an order" on page 59](#).
- Search for an activity, add and order missing recommended parts. See ["To view an activity" on page 59](#) and ["To order items for the activity" on page 60](#).
- Create and track field part movements associated with an activity. See ["To create and track field part movements using Part Tracker" on page 60](#) and ["To update quantity, source, and destination for the part movement" on page 61](#).

### *To view an order associated with a service request (SR)*

- 1 View Service Requests by selecting the SRs link from the Main Menu.  
The SR display view appears with a list of Service Requests including Service Request numbers.
- 2 Select the Service Request Number you are interested in by selecting its SR ID number.  
The SR detail view appears along with details for the Service Request you selected.
- 3 Review the orders associated with the Service Request by selecting the Orders link.  
The SR Order display view appears along with a list of Orders.

- 4 View the details of the Order number you are interested in by linking on the Order #.  
The Order detail view appears along with the details for the Order in which you are interested.

### ***To update an order***

- 1 In the Order detail view, select the Line Items link.  
The Line Item display view appears. along with the line items for the order including the line item name.
- 2 View the details of a line item by selecting the Line Item Name.  
The Line Item detail view appears.
- 3 Update the quantity requested for the line item by linking on the Qty: label.  
The Line Item Quantity Requested edit view appears.
- 4 Increase the quantity requested and click the OK soft key.  
The Line Item detail view appears along with the line item details and the updated quantity.
- 5 Change the ship method by selecting the Ship Via link.  
The Line Item Ship Method Selection view appears.
- 6 Pick the desired ship method, for example Air, and click the OK soft key.  
The Line Item detail view appears along with the line item details and the ship method changed to Air.
- 7 Select the Main menu link to return to the Main Menu.  
The Main Menu appears.

### ***To view an activity***

- 1 View all of your activities by selecting the Activities link from the Main Menu.  
The Activity display view appears.
- 2 Search for an activity by selecting the Search link.  
The Activity Search view appears.
- 3 Select the Type link to select the type of activity to search for.  
The Activity Type Pick view appears.
- 4 Pick the desired activity type to search for and click the OK soft key.  
The Activity Search view appears along with the desired activity type.
- 5 Enter the planned start date to search and click the OK soft key.
- 6 Perform the search by selecting the Submit link.  
The Activity display view appears along with a list of activities meeting the search criteria.

- 7 Select the desired activity to view activity details.  
The Activity detail view appears along with details for the activity.

### ***To order items for the activity***

- 1 In the Activity detail view, select the Items link to view the items recommended for the activity.  
The Items display view appears.
- 2 Add a new part to the Items list by selecting the New link.  
The Activity Items New Entry view appears.
- 3 Select the Product link to search the desired new part.  
The Activity Items search view appears.
- 4 Enter the first couple of characters of the part name and link on Submit.  
The Activity Items Pick view appears and displays the desired new part.
- 5 Pick the desired part.  
The Activity Items New Entry view appears along with the updated picked part name.
- 6 Add a quantity for the part.  
The Activity Item New Entry view appears along with the updated part name and quantity recommended you picked.
- 7 Add the new Item to the list by selecting the Submit link.  
The Activity Items display view appears along with the list of Items recommended for the activity, including the new item.
- 8 Place an order for the items not yet on order by selecting the Service Order All link.  
Items not previously on order now have an Order status.
- 9 View the line items for the new order by drilling down on the Order Status and selecting the Line Items link.  
The Line Item display view displays the line items included in the order just created, including the new line item just added.

### ***To create and track field part movements using Part Tracker***

- 1 Continuing from the activity in the previous example steps, track field parts movements by selecting the Part Tracker link from the Activity detail view.  
The Activity Part Tracker display view appears.
- 2 Create a new parts movement by selecting the New link.  
The Activity Part Tracker New Entry view appears.

- 3 Select the Product link to search the desired product that has moved.  
The Activity Part Tracker search view appears.
- 4 Enter the first couple of characters of the product name and link on Submit.  
The Activity Part Tracker selection view appears and displays the desired product.
- 5 Select the desired product and click the OK soft key.  
The Activity Part Tracker New Entry view appears along with the updated product name.
- 6 Select the Status link to pick the status of the moved part.  
The Activity Part Tracker Status Selection view appears.
- 7 Pick the desired status and click the OK soft key.  
The Activity Part Tracker New Entry view appears along with the updated product name and status.
- 8 Enter the new part movement by selecting the Submit link.  
The Activity Part Tracker detail view appears along with details for the new part movement, including the product name and status.

***To update quantity, source, and destination for the part movement***

- 1 From the Part Tracker detail view, enter the quantity used by selecting the Used Qty link.  
The Activity Part Tracker Used Quantity edit view appears.
- 2 Enter the desired quantity and click the OK soft key.  
The Activity Part Tracker detail view appears along with the updated used quantity.
- 3 Enter the source of the field part movement by selecting the Source link.  
The Activity Part Tracker Source selection view appears.
- 4 Pick the source and click the OK soft key.  
The Activity Part Tracker detail view appears along with the updated source.
- 5 Enter the destination of the field part movement by selecting the Destination link.  
The Activity Part Tracker Destination selection view appears.
- 6 Pick the destination and click the OK soft key.  
The Activity Part Tracker detail view appears along with the updated destination.
- 7 Commit the part movement by selecting the Commit link.  
The Activity Part Tracker display view appears along with the part movement details.
- 8 Select the Main menu link to return to the main menu.



# A

## Troubleshooting Siebel Wireless Problems

This appendix includes errors that may occur during use of the product and provides some ways to resolve those errors. It includes the following topics:

- [“Activity Description Is Lost in Siebel Wireless” on page 63](#)
- [“Digest Too Large in Siebel Wireless” on page 63](#)

### Activity Description Is Lost in Siebel Wireless

Text entered for new Activity Description may be lost on an HTML browser, if a user selects the Type link after entering the description text.

Make sure to select the Activity Type before entering the text for Activity Description.

### Digest Too Large in Siebel Wireless

Some wireless gateways and WML browsers impose a limit on the number of bytes that you can send to a wireless device in a WML deck. This limits results in error messages such as “Digest too large,” or “Entered text too long.” In certain cases, the browser may not finish downloading the deck.

Siebel Wireless applications address this limitation in their default configurations, such as returning only three records with each list.

You can also address this limitation with configuration changes to reduce the number of fields displayed, or the allowable size of text fields. For example, some fields, such as activity description, are limited to about 40 characters.



# B

## Siebel Mobile Connector

Siebel Wireless includes a license key for Siebel Mobile Connector, through which you can develop additional wireless, voice, and other applications upon executing the proper licensing agreement.

Siebel Mobile Connector uses well-formed XML to exchange information with an application either through directed query or push alerts. In addition, the XML interface allows the use of XSL stylesheets to limit the data fields returned in XML format.

### Components Beyond the XML Web Interface

Siebel Mobile Connector includes several components beyond the XML Web Interface:

#### ■ Predefined Application Definition

Siebel Mobile Connector provides a preconfigured, optimized Siebel application definition, which provides the following access:

- Employees and Partners: Accounts, Activities, Contacts, Employees, Opportunities, Service Requests, System Administrator: Responsibility Views and Users
  - Customer Self-service: eService Requests, eOrders, Branch Locator
- Siebel Mobile Connector use the Siebel Framework. The application definition can be modified within Siebel Tools.

#### ■ Metadata Business Service

The Metadata Business Service allows customers and partners to filter data offered through the preconfigured application definitions without having to use Siebel Tools to permanently change the application configuration.

The Metadata Business Service allows the extraction, parsing and creation of stylesheets from Siebel-created or customer or partner-created application definitions.

Siebel Mobile Connector stylesheets are stored as XSL documents on Siebel Application Server. When a stylesheet is applied during a query by a mobile application, the resulting data returned contains only the fields identified in the specified stylesheet.

#### ■ Reference Configuration Sample

The Reference Configuration Sample is a sample application that uses the Metadata Business Service to enable developers to create stylesheets and alerts.

The sample application allows the developer to select the fields that represent the application user interface, any fields for updates, and the fields for alerts to be triggered upon. Once selected, submission to the Metadata Business Service creates the stylesheets that are stored on Oracle's Siebel Application Server.

### ■ Uploading Files

Through specialized frame and control provided in Oracle's Siebel Mobile Connector application definition, applications can upload files and save them as attachments in the Siebel File System. The files are saved in a compressed format in the system and are decompressed when users request to download them. This is useful for speech applications that need to save audio files representing free-form fields.

### ■ Data Updates and One-Way Synchronization

In some instances, an application may require a local copy of a subset of Siebel data for its own use. Such applications can periodically check whether there is any new data available and retrieve just the data that has changed. This can be useful for synchronization of records or for real-time dynamic grammars (for speech applications).

### ■ Alert Business Service

Siebel Mobile Connector Alert Business Service pushes alerts to a registered application that processes them to send notification messages to users. The alerts capture both pre-write as well as post-write data that is sent to the registered application. This allows the registered application to take appropriate action based on these changes. This is useful for notification of Service Request ownership changes from one user to another.

For additional information, see *Siebel Mobile Connector Guide*.

# C

## WAP Server Deployment Options

This appendix covers WAP server deployment options. It includes the following topics:

- [“About WAP Server Deployment Options” on page 67](#)
- [“Carrier Option for WAP Server Deployment” on page 68](#)
- [“Enterprise Option for WAP Server Deployment” on page 70](#)

### About WAP Server Deployment Options

The wireless carrier or your own enterprise can host the WAP server.

This topic explains the two deployment options and suggests reasons you might choose one over the other.

In addition to the carrier solution discussed in [“About Establishing an External IP Address” on page 17](#), Oracle also supports an enterprise solution in which the wireless gateway is located within the enterprise's network firewall. This solution may provide an additional level of security.

Data sent across the Internet between the enterprise Web server and the carrier's WAP gateway is through the HTTP protocol and is *not* encrypted. However, it is possible to alternatively use the HTTPs protocol, which is encrypted. Traffic between the WAP gateway and the wireless device uses the WAP protocol and is encrypted. Be sure to verify all encryption information with your carrier.

If security is paramount and you are using a carrier solution, it is possible to set up a secure data connection for the carrier solution. This would connect the carrier's WAP gateway to the enterprise Web server, thereby bypassing the Internet. Additionally, there is reduced latency with this solution.

## Carrier Option for WAP Server Deployment

With this option, the carrier (wireless network operator) hosts the WAP server, while your enterprise hosts all other components, as shown in [Figure 3](#). The most important feature of this scenario is that the Web server and the WAP server are not within the same firewall.

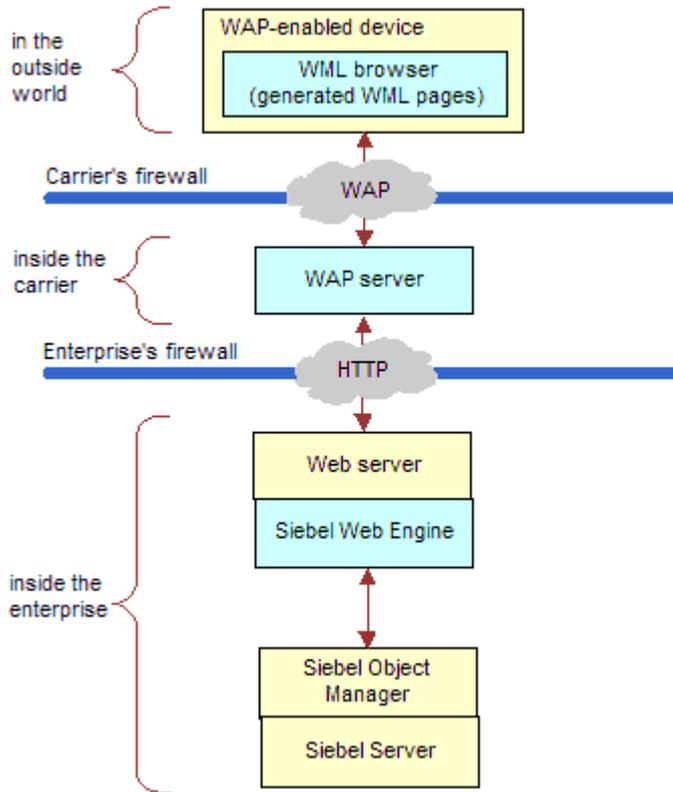


Figure 3. WAP Server and Web Server Behind Different Firewalls

There is latency associated with the Internet connection between the WAP server and the Web server. A dedicated private Internet connection can improve such latency.

## Carrier Option Benefits and Drawbacks

Table 12 summarizes the benefits and drawbacks of the Carrier Option.

Table 12. Carrier Option: Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none"><li>■ The use of the server is part of your wireless data service. No need to license additional software.</li><li>■ No setup is required for the WAP server, though there may be additional costs if you choose to install a dedicated line between the enterprise and the carrier.</li><li>■ The maximum number of concurrent users can be significantly higher than through an enterprise WAP server.</li></ul>	There is latency associated with the Internet connection between the WAP server and the Web server.

Contact your carrier if you have questions about the carrier's WAP server.

# Enterprise Option for WAP Server Deployment

This option is the alternative to the Carrier Option. Rather than relying on your carrier's WAP server, you install your own WAP server on a machine inside your enterprise's firewall, as shown in [Figure 4](#).

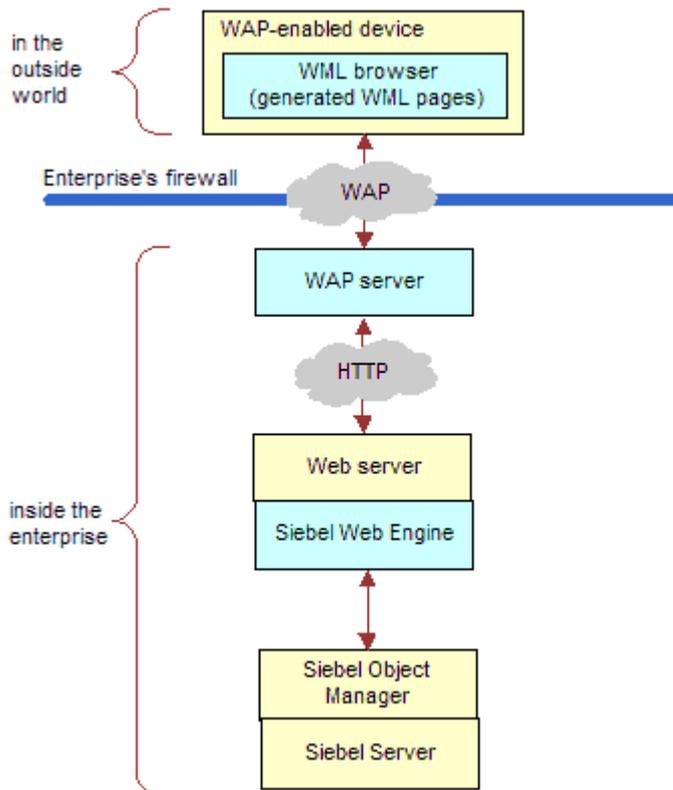


Figure 4. WAP Server and Web Server Behind the Same Firewall

## Enterprise Option Benefits and Drawbacks

With the Enterprise Option, you minimize security and latency concerns but incur the cost of buying, setting up, and maintaining your own WAP server, modem bank, and remote access server (RAS), as shown in [Table 13](#).

Table 13. Enterprise Option: Benefits and Drawbacks

Benefits	Drawbacks
<ul style="list-style-type: none"> <li>■ Data is secure during the entire transaction, assuming the security software for the WAP server is properly installed.</li> <li>■ You have more control over the entire system, are able to create backups, and can better manage security and latency.</li> </ul>	<ul style="list-style-type: none"> <li>■ You need to purchase a WAP server.</li> <li>■ You are responsible for purchasing and setting up the additional components, including RAS software and a modem bank.</li> <li>■ The additional setup adds to the implementation time.</li> </ul>



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