Siebel Analytics User Guide

Version 7.7.1
June 2004

Contents

Chapter 5: Formatting Requests in Siebel Answers

Chapter 6: Working with Siebel Analytics Views in Siebel Answers

Chapter 7: Using Siebel Intelligence Dashboards

Chapter 8: Using Siebel Delivers

Index

1 What's New in This Release

What's New in Siebel Analytics User Guide, Version 7.7.1

Table 1 lists changes described in this version of the documentation to support release 7.7.1 of the software. Siebel Analytics, Version 7.7.1, is compatible with Siebel operational applications, Version 7.7.

Table 1. New Product Features in Siebel Analytics User Guide, Version 7.7.1

Topic	Description
Performing common tasks See "Performing Common Tasks in Siebel Analytics" on page 14	Updated procedures for performing common tasks in Siebel Analytics, such as viewing descriptions of dashboards and saved requests, and downloading saved requests.
Refreshing information See "Refreshing Information in the Siebel Analytics Selection Pane" on page 17	Added procedure for refreshing the information in the selection pane to see the most current information.
Siebel Answers start page See "Using Siebel Answers to Create, Modify, and Save Requests" on page 27	Updated procedures for working with basic Siebel Answers features.
Filtering requests See Chapter 4, "Filtering Requests in Siebel Answers"	Updated all topics and procedures for filtering requests in Siebel Answers.
Column formatting functions See "Using Column Formatting Functions in Siebel Answers" on page 57	Updated all topics and procedures for using column formatting functions to format requests in Siebel Answers.
Compound layout view See "Assembling Views for Display on a Dashboard Using Siebel Analytics Compound Layout View" on page 81	Added procedures for using the compound layout view to assemble different views for display on a dashboard.
Nested Request view "Working with Siebel Analytics Nested Request Views"	Removed this topic from the chapter "Working with Siebel Analytics Views" because it is obsolete.

Table 1. New Product Features in Siebel Analytics User Guide, Version 7.7.1

Topic	Description
Chart view See "Showing Results in Charts Using Siebel Analytics Chart View" on page 86	Updated this topic to describe the updated user interface and new charting capabilities.
Dashboard Editor See "Adding Content to a Siebel Intelligence Dashboard" on page 125	Added procedures for using the Dashboard Editor to add content to a dashboard.
Siebel Analytics Briefing Books See "Working with Siebel Analytics Briefing Books" on page 143	Added procedures for working with Siebel Analytics Briefing Books, which allow you to download and share content for offline viewing.
Triggering workflows See "Specifying Actions to Execute at Siebel Delivers iBot Completion" on page 162	Siebel Analytics Version 7.7.1 supports native integration with Siebel Workflow Version 7.7 so that iBots can trigger workflow tasks.
Chapters 9 through 21	Removed the chapters describing reports and dashboards for Siebel operational applications. Descriptions are now available in the user interface.

Additional Changes

■ Most content in this guide was rewritten and reorganized to reflect the updated user interface.

2 Getting Started with Siebel Analytics

This chapter describes the major features and functions of Siebel Analytics that most end users typically work with. It explains how Siebel Analytics works, how security settings are determined, how to access Siebel Analytics, and provides procedures for commonly performed tasks. This chapter contains the following topics:

- "Overview of Siebel Analytics For End Users" on page 9
- "Accessing Siebel Analytics" on page 12
- "Performing Common Tasks in Siebel Analytics" on page 14
- "Navigating in Siebel Analytics" on page 18
- "Using the Siebel Analytics My Account Page" on page 20
- "Editing Names and Descriptions of Objects in the Siebel Analytics Web Catalog" on page 21

Overview of Siebel Analytics For End Users

Typically, organizations track and store large amounts of data about products, customers, prices, contacts, activities, assets, opportunities, employees, and other elements. This data is often spread across multiple databases in different locations with different versions of database software.

After the data has been organized and analyzed, it can provide an organization with the metrics to measure the state of its business. This data can also present key indicators of changes in market trends and in employee, customer, and partner behavior. Siebel Analytics helps you obtain, view, and analyze the data.

This section contains the following topics:

- "How Siebel Analytics Works" on page 10
- "If You Are a User of a Siebel Analytics Application" on page 10
- "If You Are a User of Stand-Alone Siebel Analytics" on page 11

How Siebel Analytics Works

This topic provides a broad overview of Siebel Analytics and how it works, from an end-user perspective.

Siebel Analytics has four main components:

■ **Siebel Analytics operational applications**. For sites with Siebel eBusiness Applications, also referred to as Siebel operational applications, a Siebel Analytics application is a configurable analytic application accessible from a Siebel eBusiness application that uses industry best practices and addresses key functional areas across Siebel applications within an organization. For example, Siebel Sales Analytics is a configurable analytic application accessible from the Siebel Sales operational application. Siebel Analytics applications are integrated with Siebel eBusiness Applications to provide business metrics in reports, in context with an organization's business function and industry.

■ **Siebel Answers**. Siebel Answers provides answers to business questions. It allows you to use and create requests that let you explore and interact with information, and present and visualize information using charts, pivot tables, and reports. You can save, organize, and share the results.

Requests that you create with Siebel Answers can be saved in the Siebel Analytics Web Catalog and integrated into any Siebel Analytics home page or dashboard. Results can be enhanced through charting, result layout, calculation, and drilldown features.

■ **Siebel Intelligence Dashboards**. Dashboards provide points of access for analytics information. Results from Siebel Answers can be placed into dashboards for your use or use by others. (When you access Siebel Analytics, your default dashboard is typically the first page that you see.)

Dashboards are typically used to display content specific to the needs of users or groups. Siebel Analytics allows you to create your own dashboards or to access preconfigured dashboards. Historical and current data sources can be merged into a single dashboard.

■ **Siebel Delivers**. Siebel Delivers is the interface used to create alerts based on analytics results. If your organization licensed this interface, you can use Siebel Delivers to detect specific results within reports and immediately notify the appropriate person through Web, wireless, mobile, and voice communications channels. For example, if you want to be notified when a particular event occurs, such as one of your accounts going critical, you can create an alert that will notify you through a number of delivery options, such as email or your cell phone.

Siebel Delivers uses intelligence bots called iBots. iBots are software-based agents, driven by schedules or events that can access, filter, and perform analytics on data based on criteria you specify.

If You Are a User of a Siebel Analytics Application

For organizations with Siebel Analytics applications, Siebel Analytics is integrated into Siebel eBusiness operational applications. For example, Siebel Sales Analytics applications are integrated into the Siebel Sales operational application. Applications include Extract Transform Load (ETL) routines to extract, transform and load data from the Siebel OLTP into the Siebel Data Warehouse. They also contain metadata that maps to the Siebel Data Warehouse and the transactional database, and define key measures and metrics for all levels of the organization.

About Preconfigured Reports and Dashboards in Siebel Analytics Applications

Siebel Analytics applications also include preconfigured reports on preconfigured dashboards that cover the majority of business reporting needs. These reports and dashboards deliver information to you based on your organizational responsibility. The data being analyzed is located in the Siebel Data Warehouse. The subject areas that you use when constructing reports are included with your Siebel Analytics application.

About Security in Siebel Analytics Applications

Siebel Analytics applications use security mechanisms that allow only authorized users to access data. There are three types of security in Siebel Analytics applications:

- **Analytics application business logic object security.** This controls access to objects, such as subject areas, tables, and columns. For example, users in a particular department can view only the subject areas that belong to their department.

- **Web object security**. This provides security for objects stored in the Siebel Analytics Web Catalog, such as dashboards, dashboard pages, folders, and reports. You can view only the objects for which you are authorized. For example, a mid-level manager may not be granted access to a dashboard containing summary information for an entire department.

- **Data level security**. This controls the type and amount of data that you can see in a report. When multiple users run the same report, the results that are returned to each depend on their access rights and roles in the organization. For example, a sales vice president sees results for all regions, while a sales representative for a particular region sees only data for that region.

The security mechanisms in Siebel Analytics applications use the security hierarchies defined in Siebel eBusiness Applications. This minimizes the need for Siebel Analytics administrators to manage two security systems. It also allows a high degree of control over access to elements in Siebel Analytics applications.

If You Are a User of Stand-Alone Siebel Analytics

Stand-alone Siebel Analytics is not shipped with metadata, preconfigured reports, or preconfigured dashboards. Instead, a system administrator in your organization uses Siebel Analytics to organize corporate data and create subject areas for you to use when constructing reports. Administrators also configure user security in Siebel Analytics.

Administrators may create several reports and dashboards for you, or customize the look and feel of the user interface to resemble your organization's corporate style.

Accessing Siebel Analytics

This section explains how to access and exit Siebel Analytics. It contains the following topics:

■ "Accessing a Siebel Analytics Application" on page 12

■ "Accessing Stand-Alone Siebel Analytics" on page 13

Accessing a Siebel Analytics Application

Depending on your organization's Analytics options, you may be able to access one or more Siebel Analytics applications in your Siebel eBusiness application.

To access Siebel Analytics in a Siebel eBusiness application

■ Navigate to the Analytics tab for the application and click it.

The default dashboard for your role and responsibilities appears.

Figure 1 shows an example of a dashboard for a Siebel Analytics application.
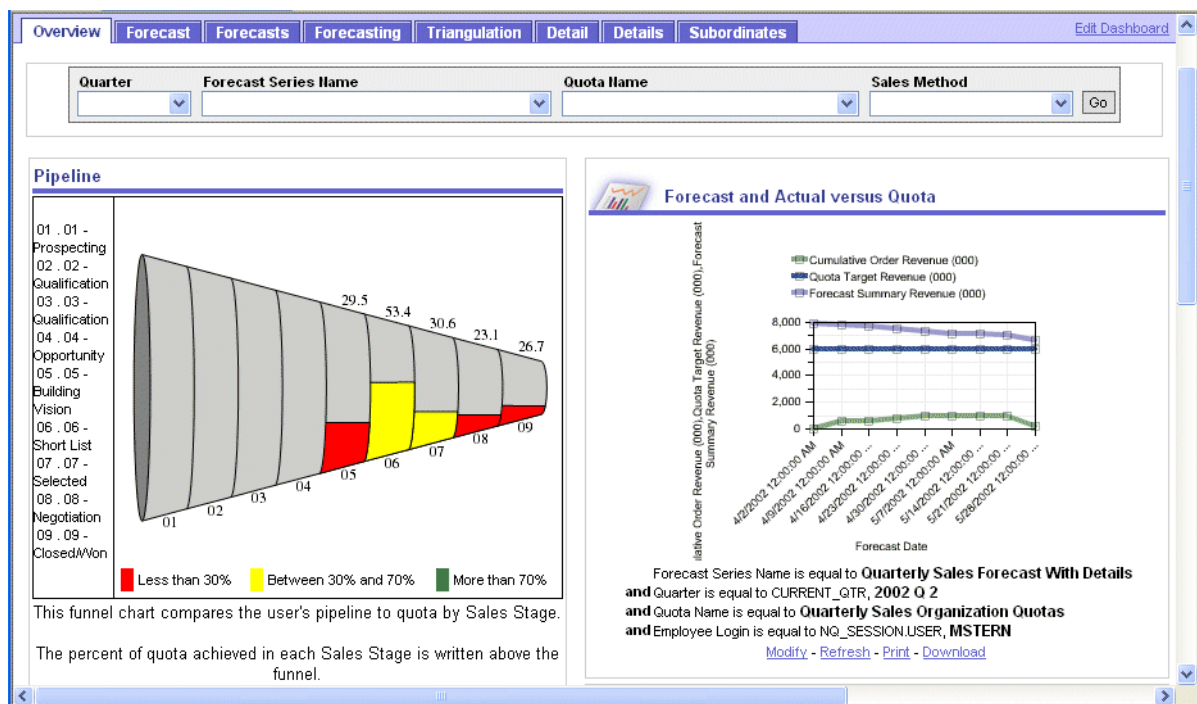
Figure 1. Sample Siebel Analytics Application Default Dashboard

Siebel Analytics applications are organized into dashboards and pages. Each dashboard contains one or more pages that display reports targeted to a specific business industry or group of users. Figure 1 shows an example Pipeline Analytics dashboard from an example Siebel Sales application. In Figure 1, the pages on the Pipeline Analytics dashboard are shown as tabs across the top of the dashboard.

Accessing Stand-Alone Siebel Analytics

To access stand-alone Siebel Analytics, you use a URL, a user ID, and a password provided by your organization.

To access stand-alone Siebel Analytics

1 Type the URL into the address field on your browser.

You can also add the URL to your list of Favorites.

The Siebel Analytics login screen appears.

NOTE: The following login screen is an example. Your login screen may look different than the example.

2 Type your user ID and password.

3 Select the language in which you want to work from the drop-down list.

4 Click Login to submit your login credentials.

After your user ID and password have been verified, the screen that has been assigned as your default Web page appears. This is usually a dashboard called My Dashboard. The Siebel Analytics user interface screens will appear in the language you selected.

Performing Common Tasks in Siebel Analytics

This section explains how to perform common tasks in Siebel Analytics. It contains the following topics:

■ "Exiting from Siebel Analytics" on page 14

■ "Viewing Descriptions of Siebel Analytics Dashboards and Saved Requests" on page 14

■ "Printing a Siebel Analytics Dashboard or Saved Request" on page 15

■ "Emailing a Siebel Analytics Dashboard Page or Request" on page 15

■ "Downloading Siebel Analytics Results" on page 15

■ "Refreshing a Siebel Intelligence Dashboard or Siebel Analytics Request" on page 17

■ "Refreshing Information in the Siebel Analytics Selection Pane" on page 17

Exiting from Siebel Analytics

Do not close the browser window to exit from Siebel Analytics.

To exit from Siebel Analytics

■ From any Siebel Analytics screen, click the Log Out link.

Viewing Descriptions of Siebel Analytics Dashboards and Saved Requests

Descriptions are supplied when a dashboard or request is saved in the Web Catalog. If no description is supplied, the description defaults to the name of the dashboard or saved request.

To view the description of a saved request

■ Pause the cursor over the title of the saved request in the selection pane in Siebel Answers.

To view the description of a dashboard

■ Pause the cursor over the name of the dashboard in Siebel Intelligence Dashboards.

To view the description of a dashboard page, pause the cursor over the page tab.

Printing a Siebel Analytics Dashboard or Saved Request

Siebel Analytics allows you to display printer-friendly versions of existing dashboards and requests. A printer-friendly version does not contain any extraneous links or other hypertext items.

You can print using HTML or Adobe PDF (Portable Document Format). Adobe Reader 6.0 or greater is required to print using Adobe PDF.

NOTE: The HTML method of printing relies on the print handling capabilities of your browser. If you do not get the results you want, choose PDF to open and then print the dashboard or request.

To print a dashboard or a request

1   Navigate to an existing dashboard or request.

2   Click the Print link, and then choose HTML or PDF.

■   For HTML, a new window shows the selected item without the extraneous links.

Choose File > Print on the browser menu.

■   For PDF, an Adobe PDF window shows the selected item.

Use the options available in the Adobe PDF window to save or print the file.

Emailing a Siebel Analytics Dashboard Page or Request

You can email a dashboard page or a request as a Web archive (.mht) file.

To email a dashboard page or request

1   Navigate to the dashboard page or request that you want to send.

2   Click the Printer Friendly link.

A new browser window opens that contains the dashboard page or the request.

3   From the browser's toolbar, choose File > Save As.

4   Save the file to the desired location, with a file type of Web Archive, Single File (*.mht).

5   Send the saved .mht attachment using an email application.

NOTE: The *.mht files can also be used as a means to archive and restore requests as they exist at a particular point in time.

Downloading Siebel Analytics Results

Siebel Analytics provides options for downloading results. These appear in Siebel Answers as options for the Download link. The Download link can also appear with a request in a dashboard.

■   Download to Excel

This option makes the request results available to Microsoft Excel in HTML format, including tables or charts that appear with the results. It also includes any other views included in the report. Excel controls the positioning of the HTML.

■ Download Data

This option downloads results as a tab-separated list of values. The file will have a .csv extension to facilitate opening it in Excel. After downloading a request in tab-delimited format, you can use a third-party application to display the data.

■ Download Web Page (MHTML)

This option downloads results as a Web page. This allows you to download the underlying data for an existing request as a Web page (MHTML) file.

To download results in Microsoft Excel format

1 Navigate to the request.

2 Click the Download link and choose Download to Excel.

The File Download dialog box appears.

3 Save the file to the desired location, or open it in Excel.

4 If desired, use Excel to refine the formatted results.

For information, see your Excel documentation.

To download results as a tab-separated list of values

1 Navigate to the request.

2 Click the Download link and choose Download Data, and then save the file on your hard drive.

To download results as a Web page

1 Navigate to the request.

2 Click the Download link and choose Download Web Page (MHTML).

The File Download dialog box appears.

3 Save the file on your hard drive.

Refreshing a Siebel Intelligence Dashboard or Siebel Analytics Request

When executing a Siebel Intelligence Dashboard or a request, Siebel Analytics uses temporary storage areas, called *caches*, to save frequently accessed or recently accessed results. Storing certain results in cache helps to improve Siebel Analytics performance. You can use the Refresh feature to make sure that your request bypasses saved information in the Siebel Analytics Web cache and is issued to the Siebel Analytics Server for processing.

When you select a specific dashboard or request, Siebel Analytics Web checks its cache to determine if the identical results have recently been requested. If so, Siebel Analytics Web returns the most recent results, thereby avoiding unnecessary processing by the Siebel Analytics Server and the back-end database. If not, the request is issued to the Siebel Analytics Server for processing.

If the Siebel Analytics Server has cached results that can satisfy your request, the results are returned from that cache. If not, Siebel Analytics Server issues the request to the back-end database. You cannot force your request past the Siebel Analytics Server's cache.

Siebel Analytics Web administrators can configure cache settings for Siebel Analytics Web that control what is cached and for how long. For information, see *Siebel Analytics Web Administration Guide*. For information about the Siebel Analytics Server cache, see *Siebel Analytics Server Administration Guide*.

To refresh a dashboard or request

1 Navigate to an existing dashboard or request.

2 Click the Refresh link.

Refreshing Information in the Siebel Analytics Selection Pane

The Siebel Analytics selection pane appears in Siebel Answers and Siebel Delivers. When changes have been made to saved content or to the Siebel Analytics Server metadata, you can refresh the display to see the most current information.

NOTE: The information you see in the selection pane is determined by your permissions and responsibilities.

To refresh the information in the selection pane

■ To refresh the information for saved requests, filters, briefing books, and dashboard content, click the Refresh Display link at the bottom of the selection pane.

■ To refresh the view of the Siebel Analytics Server metadata for subject areas, click the link Reload Server Metadata at the bottom of the selection pane.

Navigating in Siebel Analytics

This section explains basic navigation within Siebel Analytics. It contains the following topics:

■ "What You See After Accessing Siebel Analytics"

■ "Using Siebel Analytics Feature Links" on page 19

■ "Working with Siebel Analytics Pages" on page 19

■ "Drilling Down in Siebel Analytics" on page 20

What You See After Accessing Siebel Analytics

When you access Siebel Analytics, the first screen you usually see is your personal dashboard, named My Dashboard, or a dashboard for your job function. Dashboards typically contains reports and other information for your area of responsibility.

For more information about dashboards, see Chapter 7, "Using Siebel Intelligence Dashboards."

Figure 2 shows an example My Dashboard page from an sample Siebel Analytics application. You can change the appearance of the My Dashboard page based on your personal preferences.

NOTE: Your dashboard may look different than the example.
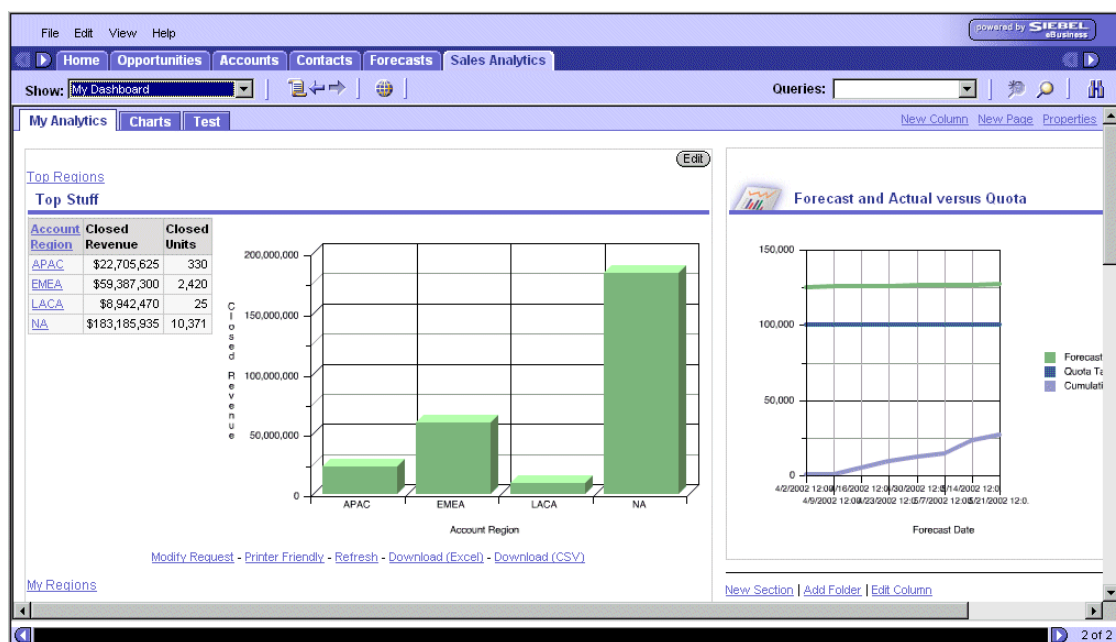
Figure 2. Example My Dashboard Page

Using Siebel Analytics Feature Links

This section describes the links that provide access to Siebel Analytics functions.

■ In stand-alone Siebel Analytics, the links are located in the upper right corner of the screen. The links you see are determined by your privilege settings.

■ In Siebel Analytics applications, the links are located on the Analytics tab, if you have permission to access those links. You can access other links as views, such as My Dashboard, My Analytics Profile, Answers, Delivers, Alerts, and Analytics Web Administration, by choosing View > Site Map. The views that you can access are determined by your role and responsibilities.

Table 2 describes some of the Siebel Analytics feature links.

Table 2. Description of Siebel Analytics Feature Links

Link	Description
Alerts!	Accesses the Active Alerts page, from which you can view and manage your active alerts.
My Account	Accesses the My Account page, from which you can view general account information and set your preferences for the Siebel Analytics application.
Answers	Accesses Siebel Answers, from which you can view, create, and manage your requests.
Dashboards	Accesses the Intelligence Dashboard page, from which you can access specific dashboards to which you have access.
Log Out	Used to log out of the Siebel Analytics application. Always use this link to log out of Siebel Analytics.

Working with Siebel Analytics Pages

Siebel Analytics is organized into pages. Pages have two components:

■ **Panes.** Both the Siebel Delivers and Siebel Answers pages display a left and a right pane. The left pane is the selection pane, used to navigate to, select, and manage saved information. The right pane is used to display and work with the content selected in the left pane.

■ **Tabs.** Tabs provide access to other pages related to the current page. The tabs appear in the top part of the page. The list of available tabs depends on which page you select.

Siebel Analytics feature links are used to access these pages. Each feature link provides access to a specific feature or topic. Pages can contain other organization and navigation elements, such as tabs, areas, and panes.

For information about feature links, see "Using Siebel Analytics Feature Links" on page 19.

Drilling Down in Siebel Analytics

Many of the results that appear in Siebel Analytics represent hierarchical data structures. Siebel Analytics metadata specifies these hierarchies, and this allows you to access the different levels of detail within them. For example, information in a sales chart may be categorized by region. Clicking on a specific region in the chart may display each country within that region, if the country is the next level within the hierarchy of the metadata.

You can drill down to an actual item in the database. For example, if you work in sales, you can drill down to the city level within a sales report, and see that there is a large sale pending in Paris. If you are using a Siebel eBusiness application, you can then drill down on the pending sale and go directly to that opportunity in the Siebel eBusiness application.

Using the Siebel Analytics My Account Page

From the My Account page in Siebel Analytics, you can perform the following actions:

■ View general account information, such as your display name and user ID.

■ View and modify your preferences.

■ View and modify your delivery options for Siebel Delivers iBots.

  For information about iBots, see "Overview of Siebel Delivers" on page 149.

■ View and manage your group memberships for Siebel Analytics.

Depending on your privilege settings, not all of these options may be available.

To display your account settings

1 Navigate to Siebel Analytics.

2 Click the My Account link.

  Your My Account page appears.

Setting Your Siebel Analytics Preferences

You can access the Preferences section of the My Account page to perform the following actions:

■ Select a default dashboard.

■ Set your location.

■ Set your language preference.

To change your preferences

1 Navigate to Siebel Analytics.

2 Click the My Account link.

3 In the Preferences section, perform one of the following actions:

■ In the Default Dashboard drop-down list, select the dashboard you want to display when you log in to Siebel Analytics.

■ In the Locale drop-down list, select the locale that you want to use for this session.

■ In the Use Interface language drop-down list, select the language in which you want Siebel Analytics to appear.

Setting Your Siebel Analytics Delivery Options

The Delivery Options section of the My Account page allows you to add or modify the devices on which you receive notifications from Siebel Delivers. For more information about setting your delivery options, see "Configuring Your Siebel Delivers Devices and Delivery Profiles" on page 166.

Quitting Siebel Analytics Group Membership

The Group Membership section of the My Account page shows the groups to which you belong. The groups that appear in this section determine which Siebel Analytics features and dashboards you can access.

To quit a Siebel Analytics group

1 Navigate to Siebel Analytics.

2 Click the My Account link.

3 In the Group Membership section, click the Quit link for the group you want to quit.

The group is removed from your Group Membership section. Any dashboards associated with the group are no longer accessible to you.

4 Click Finished.

Editing Names and Descriptions of Objects in the Siebel Analytics Web Catalog

You can use the Manage Catalog feature to edit the names and descriptions of objects in the Siebel Analytics Web Catalog. If you rename an object, you can maintain references to the previous name to prevent possible broken links. This creates a shortcut to the renamed object using the previous name.

The Manage Catalog feature is available to the Administrator user ID and to users with appropriate permissions.

To edit the name and description of an object in the Web Catalog

1 In Siebel Answers, click the Manage Catalog button on the Catalog tab in the selection pane.

The Manage Catalog page appears.

2 Locate the object that you want to edit and click the following button:

Edit Name and Description

The Rename Item page appears.

3 Type a new name for the object in the Name text box.

4 To maintain references to the object that use the previous name, click the following option:

Preserve reference to old name of this item

This creates a shortcut with the old name, pointing to the renamed object.

5 Type an optional description in the Description text box.

6 Click Rename.

3 Basics of Working with Requests in Siebel Answers

Siebel Answers is the Siebel Analytics interface used to query your organization's data. The results of your request can be saved, organized, shared, and integrated with other content. This chapter provides an overview of Siebel Answers and provides the basic procedures used to create, modify, and administer requests. It contains the following topics:

- "Overview of Siebel Answers" on page 23
- "Example of a Siebel Answers Start Page" on page 26
- "Using Siebel Answers to Create, Modify, and Save Requests" on page 27
- "Embedding a Siebel Analytics Request in a Siebel Intelligence Dashboard" on page 36
- "Integrating a Siebel Analytics Request with Microsoft Excel's Internet Query Feature" on page 36
- "Examining or Editing the Logical SQL Generated for a Siebel Analytics Request" on page 37

Overview of Siebel Answers

Siebel Answers provides answers to business questions. It allows you to explore and interact with information, and present and visualize information using charts, pivot tables, and reports. You can save, organize, and share the results.

Requests that you create with Siebel Answers can be saved in the Siebel Analytics Web Catalog and integrated into any Siebel Analytics home page or dashboard. Results can be enhanced through charting, result layout, calculation, and drilldown features.

Many features in Siebel Answers are self-explanatory, and definitions and summary information appear on each page. When more information is available than will fit on the page, a Help button appears. Click the button to see more detailed information.

Table 3 provides definitions for common terms in Siebel Answers.

Table 3. Definitions of Common Terms in Siebel Answers

Term	Definition
Column	Columns indicate the columns of data that your request will return. Together with filters, they determine what your results will contain. To run a request, you need to specify at least one column to return.
Criteria	Request criteria consists of the columns and filters you specify for a request.

Table 3. Definitions of Common Terms in Siebel Answers

Term	Definition
Dashboard	A dashboard is made up of sections of information that can contain items such as results from Siebel Answers, external Web content, HTML text, graphics, links to other sites, embedded objects such as requests, and so on. Dashboard content is organized into pages. The pages appear as tabs across the top of the screen in Siebel Intelligence Dashboards. For information about embedded requests, see "Embedding a Siebel Analytics Request in a Siebel Intelligence Dashboard" on page 36.
Dashboard Prompt	A dashboard prompt is a special dashboard filter object that affects all content on a particular dashboard page, and potentially the content on additional dashboard pages. For more information, see "Using Prompts to Simplify Filtering in a Siebel Analytics Request" on page 47.
Filter	A filter is a mechanism that allows you to restrict the result set, such as the ten best-selling items. Together with columns, they determine what your results will contain.
Folder	A folder is an organizational construct that holds any kind of content you want to see in your dashboard, including requests created with Siebel Answers. A folder is similar to an operating system directory or subdirectory, or a Microsoft Windows folder.
Query	A query is the underlying SQL issued to the Siebel Analytics Server. You do not have to know a query language to use Siebel Answers.
Results	Results are the output returned from the Siebel Analytics Server for the request criteria you specified. The Siebel Analytics Web server formats the data for presentation to you.
SELECT statement	Siebel Answers uses a modified form of the SELECT statement from Structured Query Language (SQL). Siebel Answers sends your request criteria in the form of logical SQL to the Analytics Server. The server then generates one or more requests for data, or queries, against one or more data sources. When the server gets the raw data back, it is in the form of tables that contain rows and columns. The server merges the data from multiple sources, and when necessary, applies any additional calculations or filters that pertain to the results. The server then sends the results back to Siebel Answers.

Table 3. Definitions of Common Terms in Siebel Answers

Term	Definition
Subject Area	Siebel Analytics presents data in subject areas. A subject area contains columns that represent information about the areas of your organization's business, or about groups of users within your organization.
	Subject areas have names that correspond to the types of information they contain, for example, Marketing Contracts, Service Requests, and Orders. Columns also have names that indicate the types of information they contain, such as Account and Contact.
Web Catalog	The Siebel Analytics Web Catalog stores content created with Siebel Answers and Siebel Intelligence Dashboards. Content can be organized into folders that are either shared or personal. Types of content that can be stored in the Web Catalog include requests created with Siebel Answers, HTML content, and links to other images, documents, and sites.

Example of a Siebel Answers Start Page

Figure 3 shows an example of a Siebel Answers start page. This is the first Siebel Answers page you see when clicking the Answers link (or accessing Answers from the site map if you have a Siebel Analytics application).

The Siebel Answers start page contains two panes. The selection pane on the left contains the Catalog and Dashboard tabs that you use to select items to work with. The workspace on the right contains a list of the actions you can perform and the subject areas that are available to you. The feature links listed at the top of the workspace provide access to Siebel Analytics functions.

Selection pane, with the Catalog and Dashboards tabs

Workspace, with list of actions and available subject areas

Feature links that provide access to Siebel Analytics functions
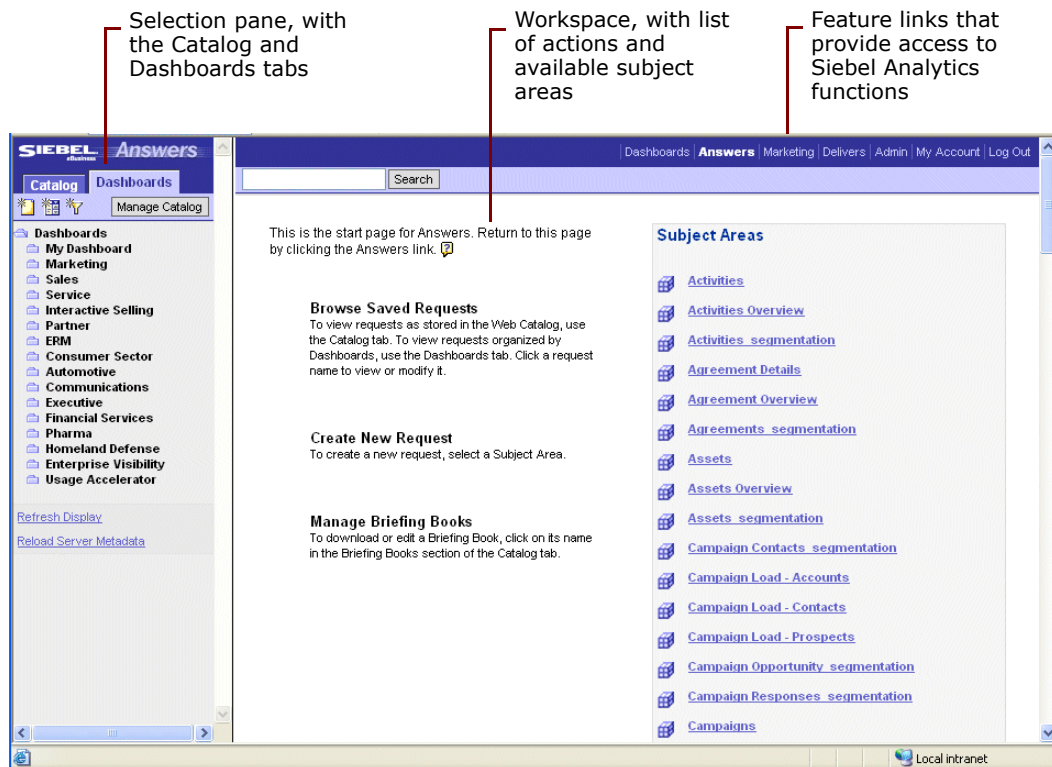
Figure 3. Example Siebel Answers Start Page

Using Siebel Answers to Create, Modify, and Save Requests

This section contains information about working with requests in Siebel Answers. It contains the following topics:

■ "Accessing Subject Areas and Requests Using the Siebel Answers Start Page" on page 27

■ "Accessing the Tabs in the Siebel Answers Workspace" on page 28

■ "Running a Request from the Siebel Answers Start Page" on page 30

■ "Creating a New Siebel Analytics Request or Changing the Criteria for an Existing Request" on page 31

■ "Specifying the Sort Order for Columns in Siebel Analytics Requests" on page 32

■ "Refreshing Information in the Siebel Answers Selection Pane" on page 34

■ "Viewing and Working with Siebel Answers Results" on page 34

■ "Saving a Siebel Analytics Request to a Personal or Shared Folder" on page 35

■ "Saving Siebel Analytics Reports to a Lotus Notes Database" on page 35

Accessing Subject Areas and Requests Using the Siebel Answers Start Page

The Siebel Answers start page provides access to subject areas and saved requests.

NOTE: What you see in Siebel Answers depends on the permissions granted to your user ID, so you may not see everything that is described in this section.

The start page has two main areas:

■ **Selection pane.** The selection pane, located on the left side of the screen, shows content saved in the Web Catalog, such as personal and shared requests and filters, and your briefing books (if your organization licensed this feature).

■ **Workspace.** The workspace, located to the right of the selection pane, initially shows the subject areas you can work with to create requests.

When you make a selection from the selection pane, such as clicking a saved request, your selection appears in the workspace so you can work with it.

When you click a subject area in the workspace to create a new request, the selection tab changes to show the columns and filters for that subject area that you can include in a request, and the workspace displays the tabs for working with requests.

To view saved requests organized by dashboard

■ Click the Dashboard tab in the selection pane.

To view saved requests as stored in the Web Catalog
■   Click the Catalog tab in the selection pane.

To search for a saved request
■   Type all or part of its name into the Search text box, and then click the Search button.

   Search results are listed in the workspace.

To return to the Siebel Answers start page
■   Click the Answers link from anywhere within Siebel Analytics.

Accessing the Tabs in the Siebel Answers Workspace
The Siebel Answers workspace displays the following tabs for working with a request:

■   **Criteria tab.** This tab provides access to the columns selected for the request, and buttons to access the most common view types.

■   **Results tab.** This tab allows you to work with the results of the request.

■   **Prompts tab.** This tab allows you to create prompts to filter the request.

■   **Advanced tab.** This tab allows advanced users to work with the XML and logical SQL for the request.

Each tab contains on-screen information and buttons to help you create, access, and manage requests. On each tab, you can pause your mouse over each button for a description of what it does. Table 4 on page 29 provides additional information about each tab.

To access the tabs in the Siebel Answers Workspace
■   Click a subject area to create a new request, or modify a saved request.

   The workspace displays the tabs for working with the request.

Table 4 describes the tabs in the Siebel Answers workspace.

Table 4. Tabs in the Siebel Answers Workspace

Tab	Description
Criteria Tab	Use the Criteria tab to view or change the columns and filters for the request. You can specify the order in which the results should be returned, column subtotals, formatting (such as headings and number of decimal places), and column formulas (such as adding a Rank or Percentile function). You can also add or modify column filters.
	Four common views are available from this tab by clicking the appropriate view button:
	Displays the compound layout view, where you can combine individual views and arrange them for display on a dashboard.
	Displays the table view, where you can show results in a table.
	Displays the chart view, where you can show results in different kinds of charts.
	Displays the pivot table view, where you can take row, column, and section headings and swap them around to obtain different perspectives.
Results Tab	Use the Results tab to work with the results of a request, and create different views of the results such as charts, tickers and pivot tables. You can add a variety of views, including charts and pivot tables that show the data, plain or formatted text that describes the results, HTML, and more. The default results view is a simple table with a title.
	You can combine views and position them anywhere on the page. For example, you can create side-by-side pivot tables that reflect different views of the data, charts that allow you to explore interrelationships in depth, and filters that limit the results. If the request is embedded in a dashboard, the dashboard page can also include links to additional requests of interest, related graphics, news stories, and so on.

Table 4. Tabs in the Siebel Answers Workspace

Tab	Description
Prompts Tab	Use the Prompts tab to create prompts that allow users to select values to filter a request. Prompts allow users to select values that dynamically filter all views within the request.
Advanced Tab	Use the Advanced tab to work directly with the XML and logical SQL generated for the request. If you know SQL and the structure of your underlying data sources, you can use the Advanced tab to view and work directly with the SQL statements generated for the request. For example, you can change the subject area or add advanced SQL statements. The Advanced tab also provides access to links that you can use to execute saved requests from an external Web page, portal, or application. **NOTE:** The Advanced tab is recommended for use only by developers or experienced users with complex data analysis needs and capabilities. Only users with the appropriate responsibilities are given access to the Advanced tab.

Running a Request from the Siebel Answers Start Page

This section explains how to run a request from the Siebel Answers start page. You can run a saved request or create a new request.

Your My Folders folder is designed to hold the requests that you run most often. This folder is located at the top of the selection pane on the Catalog tab. The first time you see this folder, it will be empty. You can populate it by saving requests to it. For more information about saving requests, see "Saving a Siebel Analytics Request to a Personal or Shared Folder" on page 35.

To run a saved request

■ In the selection pane, click a saved request from your My Folders list or from a shared folder.

   NOTE: Selecting a request from a folder causes the request to be executed immediately.

To create a new request

■ Click a subject area, select the columns and filters to include in the request, and then click the Results tab or one of the result view buttons.

   For more information, see "Creating a New Siebel Analytics Request or Changing the Criteria for an Existing Request" on page 31.

Creating a New Siebel Analytics Request or Changing the Criteria for an Existing Request

Use the following procedure to select the columns and filters to include in a request. The subject area for the request is listed on the Catalog tab in the selection pane, together with the tables and columns the request contains.

CAUTION: If you click your browser's Refresh button before you are done creating a request, be aware that the browser will reload all frames and discard your changes.

To create a new request or change the criteria for an existing request

1 Perform one of the following actions:

■ To modify an existing request, click it on Catalog tab in the selection pane, and then click the Modify button.

The Criteria tab appears in the workspace.

TIP: To go directly to the Criteria tab, press and hold down the CTRL key when you click the request.

■ To create a new request, click a subject area at the Siebel Answers start page, or click the button to create a new request (located at the top of the Catalog tab in the selection pane, and when you are working with a request, in the upper right corner of the workspace).

Creating a new request clears any previous request from the workspace, and allows you to continue working with the same subject area.

The subject area for the request appears in the selection pane, together with its columns.

2 Click on columns to add them to the request.

3 Use the column buttons to control the use of each column in the request.

For information about the column buttons, see Table 5 on page 32.

4 To reorder columns in the workspace, drag and drop a column name from its current location to another location.

5 To preview the results, perform any of the following actions:

■ Click one of the result view buttons for a table, chart, or pivot table near the top of the workspace.

■ Click the following button to see how results will look on the dashboard:

■ Click the Results tab and choose a view from the drop-down list.

6 To save the request, click the Save Request button.

For more information, see "Saving a Siebel Analytics Request to a Personal or Shared Folder" on page 35.

Table 5. Siebel Analytics Request Column Buttons

Button	Description
	Order By. The Order By button specifies the order in which results should be returned, ascending or descending. You can order results by more than one column. If you choose more than one column, the order is shown on the Order By button.
	You can click the Order By button to remove or change the sort order from a column by clicking until the sorting is changed or removed.
	Different images appear on the button, depending on the selected sort order. The example button in this table shows two arrows side by side, one pointing up, the other pointing down. For information about the forms an Order By button can take, see Table 6 on page 33.
	Format Column. The Format Column button lets you edit various format properties for the column. The button displays the image of a hand with its index finger pointing to the left and down.
	For more information, see "Using Column Formatting Functions in Siebel Answers" on page 57.
	Edit Formula. The Edit Formula button lets you change the column heading and the formula for the column, such as adding a Rank or Percentile function. The button displays the image of lowercase, italic characters fx.
	Filter By Column. The Add Filter button lets you create or edit a filter for the column. The button displays the image of a funnel.
	For more information, see "Using Column Filters in a Siebel Analytics Request" on page 39.
	Remove Column. The Delete button removes the column from the request. The button displays the image of an uppercase X.

Specifying the Sort Order for Columns in Siebel Analytics Requests

In Siebel Answers, you can specify the sort order for one or more columns that appear in a request. When you click the Order By button, it shows a new image to indicate the sort order that the selected column will apply to the results.

To sort a request based on columns in Siebel Answers

1 In Siebel Answers, display the request with which you want to work.

2 Click the Order By button for the column you want to sort by.

The button changes to indicate the sort order.

3 Continue clicking the Order By button until the sort order you want appears.

Table 6 describes the available sort orders and the images on the Order By button that represent them.

Table 6. Forms of the Siebel Answers Order By Button

Form	Description
	The image of two arrows—one pointing up, the other pointing down—indicates that the selected column will not be used to sort the results.
	The image of an up arrow indicates that the results will be sorted in ascending order, using the items in the selected column.
	A number that appears on an Order By button indicates that the column is not the primary sort column applied to the results. The number corresponds to when the sort order is applied. In this example, which shows an up arrow with the number two, the column is used as the second sort order column. The up arrow indicates that the results are sorted in ascending order, using the items in the selected column.
	The image of a down arrow indicates that the results will be sorted in descending order, using the items in the selected column.
	A number that appears on a Order By button indicates that the column is not the primary sort column applied to the results. The number that appears corresponds to when the sort order is applied. In this example, which shows a down arrow with the number two, the column is used as the second sort order column. The down arrow indicates that the results are sorted in descending order, using the items in the selected column.

Refreshing Information in the Siebel Answers Selection Pane

When changes have been made to saved content or to the Siebel Analytics Server metadata, you can refresh the display to see the most current information.

To refresh information in the selection pane for saved requests, filters, briefing books, and dashboard content

■ Click the following link at the bottom of the selection pane:

Refresh Display

To refresh information in the selection pane for the view of the Siebel Analytics Server metadata for subject areas

■ Click the following link at the bottom of the selection pane:

Reload Server Metadata

Viewing and Working with Siebel Answers Results

The following procedure explains how to view and work with basic Siebel Answers results.

To view and work with the results

1 Click the Results tab.

The results appear in the workspace, in a table.

2 (Optional) Perform one or more of the following actions:

■ To page forward and backward through the results, use the paging buttons at the bottom of the page.

NOTE: The paging buttons appear only when two or more pages of results are present.

■ To edit the criteria used in the request, click the Criteria tab or the option to show header toolbars.

■ To add prompts to the request, click the Prompts tab.

■ To edit the XML or logical SQL for a request, click the Advanced tab.

NOTE: The Advanced tab is for advanced users and developers only. Only users with the appropriate responsibilities are given access to the Advanced tab. For more information, see "Examining or Editing the Logical SQL Generated for a Siebel Analytics Request" on page 37.

■ To add grand totals or column totals to a result, use the table or pivot table view:

❏ To add grand totals, click the Grand Totals button at the top of the workspace.

❏ To add totals for an individual column, click the Total By button for that column.

NOTE: The Total By button is available only for columns that can be totaled.

Saving a Siebel Analytics Request to a Personal or Shared Folder

When you save a request in one of your personal folders, only you can access it. When you save it in a shared folder, users with permission to access that folder can access it too.

Your top-level personal folder is called My Folder. Every user with a unique user name has a folder called My Folder. This is designed to hold the requests that you run most often, and other content that you access frequently.

When you click the Refresh Display link at the bottom of the selection pane, the request is listed under the folder in which you saved it.

To save a request to a personal or shared folder

1 Click the Save Request button.

The Choose Folder dialog box appears.

2 Choose a personal or shared folder in which to save the request.

To specify a subfolder, perform one of the following actions:

- Navigate to it.

- Click Create Folder to create a new subfolder.

- Type the path in the Folder box.

3 Type a descriptive name for the request.

The name will appear when a user pauses the mouse on the request in the selection pane.

4 (Optional) Type a description for the request.

Descriptions are displayed when Siebel Analytics administrators use the Catalog Manager.

5 Click OK.

Saving Siebel Analytics Reports to a Lotus Notes Database

There are two approaches to adding Siebel Analytic reports to a Lotus Notes database:

- Save the report to a Web archive file (file extension .mht), and then upload the file to the Lotus Note database.

- Schedule the report using Siebel Delivers to be emailed automatically to a specific address on a Lotus Notes server. The Lotus Notes server can then process the email and write it to the database.

Related Topics

"Overview of Siebel Answers" on page 23

"About Siebel Analytics Views" on page 71

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Embedding a Siebel Analytics Request in a Siebel Intelligence Dashboard

Embedding a request in a dashboard causes it to execute automatically and display the results within the dashboard. This provides access to current results. For example, if you are a sales executive whose company captures sales data on a daily basis, you might want to have the dollar volume of product that was sold today appear on the front page of your dashboard.

Depending on how your organization implements caching, Siebel Answers uses the most efficient method to obtain results; either from the cache, or by running the request again and caching the results again.

You can embed saved requests by using the Dashboard Editor. For information about the Dashboard Editor, see "Adding Content to a Siebel Intelligence Dashboard" on page 125

Integrating a Siebel Analytics Request with Microsoft Excel's Internet Query Feature

Integrating a Siebel Answers data request with Excel's Internet Query (IQY) feature allows you to run the request from within Excel. This feature can be useful for printing and distributing reports.

When the IQY file is opened in Excel, you are prompted to enter your Siebel Analytics user ID and password. (You must have a nonblank password.) Then, the results of the saved request are retrieved and placed in an Excel spreadsheet. You can save the Excel spreadsheet so that the data can be refreshed directly from within Excel.

By default, Excel prompts you to enter your user ID and password each time the query is refreshed. Alternatively, you can save your user ID and password within the spreadsheet. Consult your Excel documentation for details.

NOTE: You can integrate requests into Excel's IQY feature only with results that appear in one or more table or pivot table views. Other view types are not supported.

To integrate a Siebel Analytics request with Excel's IQY feature

1 Save a request with one or more table or pivot table views.

2 At the Advanced tab in Siebel Answers, click the link to generate and download a Web Query file.

3 Save the file to the desired location.

After opening the file in Excel, you can modify it, specify additional formatting, enhance it with charts, and so on. For information, see your Excel documentation.

Examining or Editing the Logical SQL Generated for a Siebel Analytics Request

This section explains how to examine or edit the SQL or XML generated for a request.

NOTE: This procedure is only for advanced users and developers that have the appropriate responsibilities to access the Advanced tab. It is assumed that you know advanced SQL, have expertise working with the Siebel Analytics Server metadata, are familiar with the SQL information in *Siebel Analytics Server Administration Guide,* and understand the content and structure of the underlying data sources.

For example, you can edit the logical SQL for a request when the underlying presentation objects have been changed, instead of re-creating the request. For details, see the topic on migrating changes to Siebel Analytics requests and filters in *Siebel Analytics Web Administration Guide*.

The Advanced tab also provides access to links that you can use to execute saved requests from an external Web page, portal, or application. When you click the Advanced tab for a saved request, the section Referencing the Results appears. It contains the links and provides instructions to use them.

To examine or edit the XML or SQL generated for a request

1   In Siebel Answers, create or modify a request and click the Advanced tab.

The proposed XML and logical SQL appear for the request.

2   Use the Advanced SQL Clauses section following the proposed SQL to change the subject area, add GROUP BY or HAVING clauses, and specify DISTINCT processing.

3   To combine this request with a similar request from the same subject area or another subject area, where you can perform Set operations such as UNION or INTERSECT on the results, click the following button on the Criteria tab:

Combine with Similar Request

If you want to edit the SQL or XML directly, continue with the following steps.

CAUTION: When you click the Set SQL button in the next step, be aware that the Criteria tab for this request may no longer be accessible.

4   If you want to modify the SQL, read the preceding caution statement, make your modifications to the SQL directly in the Edit window, and then click the Set SQL button.

CAUTION: Requests are stored in the Web Catalog in XML format. If you change the XML in the following step, you are changing the request in the Web Catalog.

5   If you want to modify the XML, read the preceding caution statement, make your modifications to the XML directly in the Edit window, and then click the Set XML button.

Filtering Requests in Siebel Answers

A filter is used to limit the results that appear when a Siebel Analytics request is run. Together with the columns selected for a request, a filter determines what your results will contain. Based on the filter criteria, Siebel Answers shows only those results that match the filter criteria. Filters are applied on a column-level basis. A filter can also combine other filters to further constrain the results of a request. Another kind of filter, called a dashboard prompt, can apply to all items in a dashboard.

This chapter explains how to construct filters and use them to filter requests in Siebel Answers. It contains the following topics:

Using Column Filters in a Siebel Analytics Request

A column filter allows you to constrain a request to obtain results that answer a particular question. Together with the columns you select, a column filter determines what the results will contain. For example, depending on the industry you work in, you can use column filters to find out who the top ten performers are, sales for a particular brand, most profitable customers, and so on. You can create column filters for a particular request, and save them to your personal filter folder (My Filters) or to a shared filter folder if you want other users to be able to use them.

A column filter consists of the following elements:

- A column to filter, such as Order Quantity.
- A value to use when applying the filter, such as 10.

  Advanced users can include SQL expressions and session variables defined in the Siebel Analytics repository to define or limit the value.

- An operator that determines how the value is applied, such as Less Than.

  For example, if the column contains the number of units sold, the operator is Less Than, and the value is 10, the results include only order quantities only where less than 10 units were sold.

A column filter can also have the following characteristics:

■ It can be combined with other column filters from the same subject area to further constrain the results of a request.

   Filters can be grouped (a capability called parenthetical filtering) to create complex filters without requiring you to know SQL.

■ Its value can be constrained by the results of a previously-saved request from the same subject area.

The filter is translated into a WHERE clause in the SQL SELECT statement that is issued to the Siebel Analytics Server. The WHERE clause is used to limit the rows returned to those that fit the specified constraints. Advanced users can type the SQL for a filter directly.

This section provides the procedures for working with column filters in Siebel Answers. It contains the following topics:

■ "Creating a Column Filter in Siebel Answers" on page 40

■ "Saving a Column Filter in Siebel Answers" on page 43

■ "Applying a Saved Column Filter to a Siebel Analytics Request" on page 45

■ "Editing a Column Filter in Siebel Answers" on page 45

■ "Removing a Column Filter in Siebel Answers" on page 45

■ "Combining a Column Filter with Other Column Filters in Siebel Answers" on page 46

■ "Creating a Column Filter Based On Results of a Similar Siebel Analytics Request" on page 46

Creating a Column Filter in Siebel Answers

The following procedure explains how to create a column filter in Siebel Answers.

If you do not want the column to display in results, you can hide it. For more information, see "Editing the Appearance of Column Contents in Siebel Answers" on page 57.

CAUTION: If you click your browser's Refresh button before you are done creating a column filter, be aware that the browser will reload all frames and discard your changes.

To create a column filter in Siebel Answers

1 In Siebel Answers, perform one of the following actions:

   ■ To create a filter for use with a specific request, display a request to which you want to add a filter and click the Criteria tab, and then click the Filter button for the column that you want to include in the filter.

      TIP: To add a filter for a column that is not included in request, press and hold down the CTRL key at the Criteria tab and click the column name in the selection pane.

■ To create a filter for use with multiple requests, click the New Saved Filter button at the top of the selection pane, and then select the subject area that contains the column you want to use in the filter.

When the Saved Filter screen appears, select the column from the Columns area in the selection pane.

2 At the Created/Edit Filter dialog box, choose an operator from the Operator drop-down list.

The choices for operators and values appear in the left column. Depending on the type of column you select, additional options may appear in the right column, such as calendar buttons for specifying a date range, or a text-matching box for limiting long lists of values.

3 To specify a value, type it into the Value box or select a value from the right column.

Use the guidelines shown in the following table when choosing an operator and specifying values.

Operator	Usage Guidelines
is equal to / is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column matches the value in the filter.
is not equal to / is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is greater than the value in the filter.
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is less than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is greater than or the same as the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Result will include only records where the data in the column is between the two values in the filter.
is null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. Results will include only records where there is no data in the column.
is not null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results will include only records where there is data in the column.

Operator	Usage Guidelines
is in top	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the first n records, where n is a whole number specified as the value in the filter.
is in bottom	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the last n records, where n is a whole number specified as the value in the filter.
contains all	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains all of the values in the filter.
does not contain	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not contain any of the values in the filter.
contains any	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains at least one of the values in the filter.
begins with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column begins with the value in the filter.
ends with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of an percent sign character (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of an percent sign character (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column does not match the pattern value in the filter.
is prompted	Valid for a column that contains text, numbers, or dates. The user will be prompted to supply the value to use as the filter. Results will include only records where the data in the column matches what the user specifies. **NOTE:** This operator is required for columns included in dashboard prompts.

4 Use the paging controls to navigate the choices when there are many choices for the column:

■ Click on a specific page number to navigate to that page.

■ Click the double right-arrow paging button (>>) to advance to the next page, or the double left-arrow paging button (<<) to go back to the previous page.

■ Click triple right-arrow paging button (>>>) to advance to the last page, or the triple left-arrow paging button (<<<) to go back to the first page.

5 Use the calendar buttons to specify the date range for columns that contain dates.

To specify a single date, specify the same date for the beginning and ending date.

6 Use the Match box to limit the list of values to appear in the All Choices or Limited Choices list for columns that contain text or numbers.

For example, suppose you want to see results for the East region. If you type an E into the Match box, the list shows only the values that begin with an E. If you have set other constraints in the filter, the Limited Choices list shows only the choices within those constraints.

7 To add an SQL expression or a session variable defined in the Siebel Analytics repository, perform the following actions:

a Click the Add button and choose the appropriate option.

The label on the Value box changes to reflect your selection.

b Type the SQL expression or session variable name into the box.

8 To remove a value, SQL expression, or session variable, click the Delete button next to it.

To remove all definitions, click the Clear Values button.

9 To have this filter constrained by the value of a column from the same subject area in another request, click the Advanced button and choose the following option:

Filter based on results of another request

The Filter on Saved Request dialog box appears. For more information, see "Using a Saved Siebel Analytics Request as a Filter" on page 54.

10 To convert the filter to SQL, click the Advanced button and choose the following option:

Convert this filter to SQL

The Advanced SQL Filter dialog box appears. For more information, see "Editing the SQL for a Column Filter in a Siebel Analytics Request" on page 54.

11 When you are finished, click OK.

The filter appears in the Filters area on the Criteria tab or on the Saved Filters page.

Saving a Column Filter in Siebel Answers

You can save a filter as part of a request or for reuse in other requests. If a filter is for a specific request, and you save the request, the filter is saved as part of the request and will be applied every time the request runs. You can also save the filter explicitly so it can be used in other requests.

Saved filters and folders containing filters for the subject area appear following the name of the subject area. If there are no saved filters for the subject area, or if your user name does not have the appropriate permissions, this part of the page is blank.

To save a column filter as part of a Siebel Analytics request

1   At the Criteria tab in Siebel Answers, click the Save Request button.

2   At the Choose Folder dialog box, choose the location in which to save the request.

3   For more information about saving requests, see "Saving a Siebel Analytics Request to a Personal or Shared Folder" on page 35.

To save a column filter for use in other Siebel Analytics requests

1   In the Filters area on the Criteria tab, click the Save Filter button for the filter you want to save.

The Choose Folder dialog box appears.

2   Choose a folder in which to save the filter:

■   To save the filter for your personal use, click My Filters.

Filters saved in My Filters are available only to you.

■   To save the filter for use by others, click Shared Filters.

Filters saved in a shared filters folder are available to other users that have permission to access the folder.

3   To specify a subfolder, perform one of the following actions:

■   Navigate to it.

■   Click Create Folder to create a new subfolder.

■   Type the path in the Folder box.

4   Type a name for the filter.

The name will appear in the selection pane.

5   (Optional) Type a description for the filter.

Descriptions are displayed when Siebel Analytics administrators use the Catalog Manager.

6   Click OK.

When you click the Refresh Display link in the selection pane, the filter is listed under the Filters folder in either My Filters or in a shared filters folder.

To display the properties for a saved filter in Siebel Answers

■   Locate the filter in the selection pane and click it.

Applying a Saved Column Filter to a Siebel Analytics Request

You can apply a saved column filter to a request. You can apply either the contents of the filter or a reference to the filter.

When you apply the contents of a saved column filter, the actual contents of that filter are copied into the Filters area on the Criteria tab. This allows you to manipulate the filter criteria without altering the saved filter. When you apply a reference to a saved filter, the saved filter is referenced only by its name, and you can view but not alter its contents.

To apply a saved column filter to a Siebel Analytics request

1   At the Criteria tab in Siebel Answers, display a request to which you want to add a saved column filter.

2   In the selection pane, navigate to the appropriate Filters folders and click the saved filter that you want to apply.

    The Apply Saved Filter dialog box appears.

3   Specify your choices, if any, in the Filter Options area.

4   Click OK.

    The filter appears in the Filters area on the Criteria tab.

Editing a Column Filter in Siebel Answers

If your user ID has the appropriate permissions, you can edit a column filter to change its properties.

To edit a column filter in Siebel Answers

1   In the Filters area on the Criteria tab in Siebel Answers, click the menu button for the filter you want to edit and choose Edit Filter.

    The Created/Edit Filter dialog box appears.

    NOTE: The Edit Filter option is available only if you have permission to edit the filter.

2   Make your changes, and then click OK.

Removing a Column Filter in Siebel Answers

You can remove a single filter or all filters from a Siebel Analytics request.

NOTE: If the request was saved previously with any filters applied, save the request again to remove the filters.

To remove a column filter from a Siebel Analytics request

■ In the Filters area on the Criteria tab in Siebel Answers, perform one of the following actions:

- ■ To remove a single filter from a request, click the Delete button for the filter.

- ■ To remove all filters from a request, click the Remove Filters button.

Combining a Column Filter with Other Column Filters in Siebel Answers

Combining column filters, also known as parenthetical filtering, allows you to create complex filters without requiring you to know SQL.

You can combine column filters with AND and OR operators. The AND operator means that the criteria specified in each filter must be met. This is the default method for combining column filters. The OR operator means that the criteria specified in at least one of the column filters must be met.

You can save the multi-column filter. For more information, see "Combining a Column Filter with Other Column Filters in Siebel Answers" on page 46.

To combine a column filter with other column filters in Siebel Answers

1 At the Criteria tab in Siebel Answers, add at least two column filters to a request, or add at least two column filters to a saved filter.

The filters are listed in the Filters area with an AND operator between them.

2 To change an AND operator to an OR operator, click it.

3 As you add column filters, click AND and OR operators to group filters and construct the desired filter combinations.

Combined filters elements are bounded by boxes.

4 To cut, copy, or ungroup bounded elements, click the ellipses button [. . .] and choose the appropriate option.

Creating a Column Filter Based On Results of a Similar Siebel Analytics Request

You can combine criteria from one or more subject areas using Set operations.

To create a column filter value based on the results of a similar Siebel Analytics request

1 At the Criteria tab in Siebel Answers, click the following button:

Combine with Similar Request

The Subject Area dialog box appears.

2 Click the subject area that contains the request you want to use.

The Set Operations page appears.

3 Follow the on-screen instructions to construct the column filter.

> **NOTE:** The number of columns and their data types must be consistent across all requests.

Related Topics

Using Prompts to Simplify Filtering in a Siebel Analytics Request

A filter limits the results that appear when a request is run. Siebel Answers shows only those results that match the criteria.

To simplify filtering, Siebel Answers provides two types of prompts, dashboard prompts and criteria prompts:

■ A dashboard prompt is a special kind of filter that filters requests embedded in a dashboard. A dashboard prompt filters embedded requests that contain the same columns as the filter. It can filter all embedded requests in a dashboard, or embedded requests on the same dashboard page. Multiple columns in a dashboard prompt can be used to constrain users' choices for subsequent selections. For example, if one column filters on a region, and the next column filters on districts, the district column can be constrained to show only districts in the region the user selects.

  For information about embedded requests, see "Embedding a Siebel Analytics Request in a Siebel Intelligence Dashboard" on page 36.

■ A criteria prompt guides users in making selections for individual requests. There are two kinds of criteria prompts, column filter prompts and image prompts:

  ■ A column filter prompt provides general filtering of a column within a request. A column filter prompt can present all choices for a column, or, like a dashboard prompt, it can present constrained choices for a column. For example, if a request contains a Region=East filter, constraining choices for the City column restricts the selections to cities in the East region only. This eliminates the selection of a mutually exclusive filter that could result in no data.

  ■ An image prompt provides an image that users click to select criteria for a request. For example, in a sales organization, users can click their territories from an image of a map to see sales information, or click a product image to see sales information about that product. Users who know how to use the HTML <map> tag can create an image map definition.

This section explains how to work with prompts. It contains the following topics:

■ "Adding a Column Filter Prompt to a Siebel Analytics Request" on page 48

■ "Adding an Image Prompt to a Siebel Analytics Request" on page 49

For information about setting up a dashboard prompt, see "Creating a Dashboard Prompt for Filtering Siebel Analytics Requests" on page 51.

Adding a Column Filter Prompt to a Siebel Analytics Request

A column filter prompt allows users to select values to filter a column in a request. You can define the range of possible filter values and how the user selects the filter values for the request.

Column filter prompts appear on the Prompts tab. When you have multiple column filter prompts constructed for a request, they are executed in the order they are listed, from top to bottom.

To add or modify a column filter prompt in Siebel Answers

1 At the Criteria tab in Siebel Answers, modify a request to which you want to add a column filter prompt, and then click the Prompts tab.

2 From the Create Prompt drop-down list, select Column Filter Prompt.

The Column Filter Prompt Properties dialog box appears.

3 Type a caption for the column filter prompt in the Caption box.

The caption will appear to the user. You can include HTML markup tags in the caption, such as <b>, <center>, <font>, and <table>.

4 Type a description in the Description box.

Descriptions are displayed when Siebel Analytics Web administrators use the Catalog Manager.

5 From the Filter on Column drop-down list, select the column in the request that you want to filter, and then, from the Operator drop-down list, select the operator to use.

If you want the user to select the operator, select the operator *Prompt User.

6 Specify how the user should choose values by clicking the appropriate option.

Users can select values from a drop-down list, or browse through choices and type them into a text box.

7 To allow the user to choose only one value for the column filter prompt, click the check box labeled Single Value Only.

8 Select the values that should be shown to the user by clicking the appropriate option:

■ To show no values, click None.

  The user will need to type the value.

■ To show all possible values, click All Values.

■ To show a subset of values, click Limited Values.

  Limiting values is useful when prompting for multiple columns, or when the results already contain a filter. It prevents a user from choosing values that would result in no data. For example, suppose a request contains a country column and a city column, and already contains the filter Country=France. By selecting limited values for the city column filter, the choices are constrained to cities in France only, which prevents the possibility of choosing mutually exclusive filters, such as Country=Italy and City=Paris.

■ To limit the values to the results of an SQL statement, click the option SQL Results and type the SQL statement into the text box.

9 Make selections for the options in the Other Options area:

■ To explicitly limit the number of choices a user sees per page, type the number in the Choices per page box.

■ To allow the user to constrain the filter choices, click the check box next to the following option:

Allow user to constrain choices

Constrained choices help the user locate the values to use as a filter. For example, if a filter contains all the cities in France, a user can constrain the filter choices to those cities starting with P.

■ To allow a user to skip this column filter, click the check box next to the following option:

Allow user to skip prompt

This causes a Skip Prompt option to appear. The user can then click this option to bypass making a selection for this filter.

10 When you are finished, click OK.

The column filter prompt is shown on the Prompts tab.

To modify the properties of a column filter prompt in Siebel Answers

1 Click the Properties link to open the Column Filter Prompt Properties dialog box.

2 Make your changes, and then click OK.

To move a column filter prompt up or down in the execution order in Siebel Answers

■ Click the Move Up and Move Down links.

These links appear only when more than one prompt is shown on the Prompts tab.

To delete a column filter prompt in Siebel Answers

■ Click the Delete link.

Adding an Image Prompt to a Siebel Analytics Request

An image prompt provides an image that users click to select their request criteria. For example, from an image that shows products, users can click a product. The selected product is then used to filter the underlying request. To create an image prompt, you need to know how to use the HTML <map> tag to create an image map definition.

Image prompts appear on the Prompts tab in Siebel Answers. When you have multiple image prompts constructed for a request, they are executed in the order they are listed, from top to bottom.

To add or modify an image prompt in Siebel Answers

1 In Siebel Answers, display a request to which you want to add an image prompt, and then click the Prompts tab.

2 From the Create Filter drop-down list, select Image Prompt.

The Image Map Prompt Properties dialog box appears.

3 Type a caption for the image prompt in the Caption box.

The caption will appear to the user. You can include HTML markup tags in the caption, such as <b>, <center>, <font>, and <table>.

4 Type a description in the Description box.

Descriptions are displayed when Siebel Analytics administrators use the Catalog Manager.

5 Type the location and name of the image in the Image URL box.

If the image prompt is for your use only, you can specify a location that only you can access, such as c:\mycomputer\temp\map.gif. For an image prompt that will be available to other users, specify the Universal Naming Convention (UNC) name, such as \\ALLUSERS\graphics\map.gif.

6 Type the appropriate HTML <map> tags and data in the HTML box.

7 To extract the image map information from the HTML, click the link Extract Image Map from HTML.

The Image Map Prompt Properties dialog box expands to show the area titles, shapes, and coordinates entered in the HTML box.

■ For each area, in the Column box, type the name of the column to pass when a user clicks it, and the value to use.

NOTE: The column needs to be a fully qualified column name, in the format Table.Column Name.

■ Place double quotes around any column names containing spaces. These are examples:

❏ "Country name"

❏ "Units shipped"

8 When you are finished, click OK.

The image prompt is shown on the Prompts tab.

9 To preview the image prompt, click the preview button.

When you click an area of the image, the underlying filter constructed for that area displays. You can click the Refresh link to see the results. You can change the filter criteria and then click the Refresh link again to see the change reflected in the results.

To modify the properties of an image prompt in Siebel Answers

1 Click the Properties link to open the Image Map Prompt Properties dialog box.

2 Make your changes, and then click OK.

To move an image prompt up or down in the execution order in Siebel Answers

■ Click the Move Up and Move Down links.

 These links appear only when more than one prompt is shown on the Prompts tab.

To delete an image prompt in Siebel Answers

■ Click the Delete link.

Related Topics
"Using Column Filters in a Siebel Analytics Request" on page 39

Creating a Dashboard Prompt for Filtering Siebel Analytics Requests

A dashboard prompt filters the results of embedded requests to show only results that match the prompt criteria. A dashboard prompt can filter all requests embedded in a dashboard or requests on certain dashboard pages only. For information about embedded requests, see "Embedding a Siebel Analytics Request in a Siebel Intelligence Dashboard" on page 36.

You select the columns and operators for the dashboard prompt, and specify how the prompt appears on the dashboard and how users select the values. The user's selections determine the content of the reports embedded in the dashboard or dashboard page. Every column contained in the dashboard prompt must be contained, in the projection list or in the filter, in each request that you want the prompt to filter. The columns in the request must have filters set, or the filter condition has to be set to Is Prompted. Columns contained in the prompt that are not included in the request will not filter the request.

If you include multiple columns in a dashboard prompt, you can constrain users' choices for subsequent selections. For example, suppose one column filters on Region, and the next column filters on District. By clicking the Constrain check box for District, you can constrain the District column to show only districts consistent with the user's selection for Region. If the user were to choose the east region from the Region prompt, the District prompt would show districts in the east region only.

NOTE: Constrained columns will be constrained by all other columns in the prompt. For example, if the prompt contains columns Year, Region, and District, and Constrain is checked for District, the values shown in District will be limited by the values entered in Region and Year.

After you create a dashboard prompt, save it in a personal folder under My Folders or in a shared folder. If you save the prompt in a personal folder, it is available for use only on your dashboard. If you save it in a shared folder, it is available for use by other users who have permission to use objects in the shared folder. After you have saved a dashboard prompt, you can add it to a dashboard.

The following procedures explain how to create, save, and edit a dashboard prompt, and how to add a dashboard prompt to a dashboard.

To create a dashboard prompt in Siebel Answers

1   Click the Answers link to navigate to the start page in Siebel Answers, and then click the following button at the top of the selection pane:

New Dashboard Prompt ...

2   Select the subject area that contains the column to use as the filter.

The Dashboard Prompt page appears.

NOTE: If the column is also included in a column filter prompt in an embedded request, its value must be set to Is Prompted in the Created/Edit Filter dialog box in order for the dashboard prompt to filter the embedded request. All columns in a dashboard prompt must come from the same subject area, and all columns in the dashboard prompt must be included in the embedded requests that you want the dashboard prompt to filter.

3   In the Scope drop-down list, specify whether the dashboard prompt applies to the entire dashboard or a dashboard page.

4   To select a column to use as a filter in the dashboard prompt, click it in the selection pane.

You can add multiple columns to a dashboard prompt.

To remove a column from the prompt, click the Delete button for that column.

NOTE: The number of columns you include in a dashboard prompt can affect performance. For example, columns that show values in a drop-down list require a request to the Siebel Analytics Server to populate the list. In general, you should limit the number of columns to nine or less.

5   Make your selections for the following options:

    a   Select the operator to use from the Operator drop-down list.

    b   Select the Control type to indicate how users will select the value for the filter.

       The choices are to select it from a calendar, a drop-down list, or a multiple list of values, or type it into an edit box.

    c   If you choose a drop-down list, then, in the Show list, indicate which values you want to appear in the drop-down list.

       You can show all values or develop an SQL statement to limit the drop-down list to certain values.

    d   To constrain the choices for a column depending on the selection the user makes from the previous column, click the Constrain check box.

    e   In the Default to list, choose the value that you want users to see initially.

       You can show the report defaults, all choices, or a specific value. If you select a specific value, a field appears in which you can type the value.

    f   In the Label box, type a name to use for the filter label.

       If you leave the Label box empty, the column label is used as the filter label.

6   To reorder columns in the prompt, click the Order By buttons.

This controls the order in which the selections appear to users.

7 If you want the selected prompt and all other prompts that follow it to appear on a new line in the filter, click the box in the Group list.

8 To preview how the prompt will appear on the dashboard, click the preview button.

To save a dashboard prompt

1 When you are finished creating a dashboard prompt, click the Save button.

The Choose Folder dialog box appears.

2 Save the dashboard prompt to a personal or a shared folder, and give the dashboard prompt a descriptive name.

You may also want to indicate in the name whether the dashboard prompt is for an entire dashboard or for a dashboard page.

NOTE: Prompts saved in personal folders are available only to you. Prompts saved in shared folders are available to other users that have permission to access the folder.

3 (Optional) Type a description in the Description box.

Descriptions are displayed when Siebel Analytics administrators use the Catalog Manager.

To edit a dashboard prompt

1 Click the Answers link to go to the start page in Siebel Answers.

2 Locate the dashboard prompt:

■ On the Catalog tab in the selection pane, the prompt is visible in the folder in which you saved it.

■ On the Dashboard tab, the prompt is visible on the dashboard or dashboard page to which you added it.

3 Click the dashboard prompt to edit it.

You can also edit the dashboard prompt from the Dashboard Editor.

To add a dashboard prompt to a dashboard or dashboard page

1 In Siebel Intelligence Dashboards, navigate to the dashboard or the specific dashboard page to which you want to add the dashboard prompt, and then click the Dashboard Editor link.

The Dashboard Editor appears.

2 From the selection pane, in the Saved Content area, navigate to the folder that contains the dashboard prompt you want to add.

3 Drag and drop the dashboard prompt into a section in the dashboard page.

If the dashboard prompt was created for the entire dashboard, the dashboard prompt appears on every page of the dashboard. If the dashboard prompt was created for a dashboard page, it appears only on the pages to which you add it.

Related Topics

"Using Column Filters in a Siebel Analytics Request" on page 39

"Adding Content to a Siebel Intelligence Dashboard" on page 125

Using a Saved Siebel Analytics Request as a Filter

Filters can be combined with other filters, as well as be based on the values returned by another request. Any saved request that returns a column of values can be used to filter the selected column in your request.

To create a filter based on the results of another saved request

1 At the Filter on Saved Request dialog box, select the appropriate relationship between the results and the column to be filtered from the Relationship drop-down list.

2 Browse to navigate to the saved request, or type the complete path into the text box.

If the saved request contains a matching column name, it appears in the Use Values in Column drop-down list. If you want to use another column, select it instead.

3 Click OK.

The filter appears in the Filters area on the Criteria tab.

Related Topics

"Using Column Filters in a Siebel Analytics Request" on page 39

Editing the SQL for a Column Filter in a Siebel Analytics Request

You can edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who need advanced filtering capability. For a comprehensive description of SQL syntax, refer to a third-party reference book on SQL, to a reference manual on SQL from one of the database vendors, or to an online reference site.

To edit the SQL generated for a column filter

1 While in the column filter dialog, click the Advanced button, and then select the following menu option:

Convert this filter to SQL

2 Type your modifications into the text box, and then click OK.

The filter appears in the Filters area on the Criteria tab.

Example Siebel Answers Filters

This section contains example SQL for example requests against hypothetical data sources. The
WHERE clause contains the filters. You can review these examples to see some of the kinds of
information you can obtain using filters.

If you want to use an example in an actual request, you will need to modify it to reflect the table and
column names used in your organization's data sources.

Example 1: Identifying Customers with the Most Sales Volume

The following example request reports data on the ten customers with the most sales volume in
2003.

SELECT Customers.Customer, Periods.Year,

SalesFacts.Dollars, RANK(SalesFacts.Dollars),

Sales_YAgo.DollarsPctChgVsYAgo,

RANK(Sales_YAgo.DollarsYAgo)

FROM "SupplierSales"

WHERE Periods.Year = 2003

AND RANK(SalesFacts.Dollars) <= 10 ORDER BY 4

Example 2: Reporting Sales for a Particular Brand

The following example request reports data on the Fizzy Brands company.

SELECT * from "SodaTable"

WHERE Product.Brand = 'Fizzy Brands'

Example 3: Reporting Salaries Above a Certain Amount

In the following example request, the filter in the WHERE clause limits the output to individuals
whose yearly salaries are greater than 75000, for example, $75,000 in US dollars.

SELECT "Name.Lastname", "Name.Firstname",

"Salary.YearlySalary" FROM "SalaryTable"

WHERE "Salary.YearlySalary" > 75000

ORDER BY 3 DESC

Example 4: Sales Representative's Share of East Region

The following example request limits data to customers in the East region in the year 2003.

SELECT Periods.Year, Customers.Region,

Customers.SalesRep, SalesFacts.Dollars,

```
SalesFacts."ShareOfRegion$",

Sales_YAgo."ShareOfRegion$YAgo"

FROM "SupplierSales"

WHERE Periods.Year = 2003

AND Customers.Region = 'East'
```

Related Topics

"Using Column Filters in a Siebel Analytics Request" on page 39

5 Formatting Requests in Siebel Answers

This chapter explains how to format requests. After you run a request, the results are formatted using default formatting rules. By adding additional formatting to the results, you can help focus on blocks of related information and call attention to specific data elements. This chapter contains the following topics:

- "Using Column Formatting Functions in Siebel Answers" on page 57
- "Using Custom Date/Time Format Strings in Siebel Answers" on page 64

Using Column Formatting Functions in Siebel Answers

You can edit properties for a column to control the appearance and layout of a column and its contents. You can also specify formatting to apply only if the contents of the column meet certain conditions. By default, your selections for a column apply only to the current request.

If your user ID has the appropriate permissions, you can save your selections as the system-wide default settings to use every time that data from the column, or columns of this particular data type, appear in results.

This section explains how to use the column formatting functions. It contains the following topics:

- "Editing the Appearance of Column Contents in Siebel Answers" on page 57
- "Editing the Layout of Column Contents in Siebel Answers" on page 58
- "Formatting Column Content In Siebel Answers" on page 60
- "Applying Conditional Formatting to Column Content in Siebel Answers" on page 62
- "Saving Your Siebel Answers Column Property Settings as the System-Wide Defaults" on page 64

Editing the Appearance of Column Contents in Siebel Answers

The default appearance of column contents in results is based on cascading style sheets and XML message files. You can use the Value Format tab of the Column Properties dialog box to override several default settings, such as the font and font size to use. Your selections apply only to the contents of the column for the request with which you are working.

To edit the appearance of column contents

1 In Siebel Answers, click the Properties button for a column to open the Column Properties dialog box, and then click the Value Format tab.

2 Make your choices for font, cell, border, image, and advanced style formatting options.

For more information, see "Formatting Column Content In Siebel Answers" on page 60**.**

3 In the Data Format area, you can control the way the data is displayed by clicking the following option:

Override Default Data Format

This option allows you to override the default display characteristics. The selections that you see vary based on the data type. For example, if the column contains numeric data, you can choose how you want the numbers treated, such as percentages, month names, or dates. You can choose the number of decimal places to display, how to display negative numbers, the number of digits to show, and the thousands separator to use. If your column contains text, you can choose how to treat the text, such as plain text, HTML, or a link. Based on your selection, the Custom Text Format text box displays the applicable HTML string used to display the data.

■ To use a custom format for text, choose Custom Text Format from the drop-down list, and then type the custom format. You can type HTML calls that provide special formatting. You can also type any valid HTML string, including JavaScript, VBScript, and so on.

For example, the following example HTML sets the column width and height in tables and pivot tables. In the example, the text html enclosed in brackets ([html]) means to use HTML, and the at sign character (@) represents the dynamic contents of the column.

```
[html]<span style="width:200px; height:50px">@</span>
```

If you do not know HTML, JavaScript, VBScript, and so on, consult a third-party reference.

■ To create a custom numeric format, you can use the number sign (#) to include significant digits, and the number zero (0) to include as many digits as specified, even if the number does not contain that detail.

For example, specifying ##.# shows 12.34 as 12.3, and specifying ##.000 shows 12.34 as 12.340.

■ To use a custom date format, see "Using Custom Date/Time Format Strings in Siebel Answers" on page 64.

4 Click OK when you are done.

Editing the Layout of Column Contents in Siebel Answers

Use the Column Format tab of the Column Properties dialog box to perform the following tasks:

■ Specify whether the column should appear in results.

Columns are usually visible in results by default. However, you may want to include a column in your request that you do not want displayed in results, such as a column used in creating a filter.

■ Assign alternate table and column headings and apply custom formatting to them.

■ Control the display of duplicate data such as repeating column labels.

The data in one column of a table may be repeated in relation to rows of data in other columns in the table. For example, if one column lists customer names and another column lists the regions those customers are in, the region data could be repeated for each customer row. You can choose to display duplicate data only once, or display it for every row. Displaying repeating or duplicated data only once can make a table somewhat easier to read, and can make distinctions in that data more apparent.

■ Specify the interaction that should occur when users work with the results, such as navigation to another request or dashboard.

Your selections apply only to the contents of the column for the request with which you are working.

To hide a column in results

1 In Siebel Answers, click the Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.

2 Click the Hide Column check box to add a check mark.

To create custom table and column headings

1 In Siebel Answers, click the Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.

2 In the Headings area, click the Custom Headings check box.

This allows you to change the heading text or the heading formatting (or both the text and the formatting).

3 To change the text of the table or column heading, type a new heading into the appropriate text box.

The heading will be used in this request instead of the default heading.

NOTE: You can also specify navigation to another request or dashboard in the Interaction area.

4 To change the format of the table or column heading, click the Edit Format button next to the text box.

The Edit Format dialog box appears.

5 Make your choices for font, cell, border, and advanced style formatting options.

For more information, see "Formatting Column Content In Siebel Answers" on page 60.

To suppress duplicate data

1 In Siebel Answers, click the Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.

2   In the Value Suppression area, choose the appropriate option:

- To display repeating data only once and suppress duplicate rows, click Suppress.

- To display repeating data for every row, click Repeat.

- To retain the default display characteristics, click Default.

To specify what happens when users click the column

1   In Siebel Answers, click the Properties button for a column to open the Column Properties dialog box, and then click the Column Format tab.

2   To specify what should happen when users click the column, click the appropriate option:

- To restore the default interaction, click Default.

- To allow drilldown functionality, click Drill.

- To allow navigation to another saved request or dashboard, click the following option:

  Navigate to another request or dashboard

  Then, click the Browse button to open the Choose Request/Dashboard dialog box, navigate to the target request or dashboard, and click OK.

- To disable drilling or navigation, click No Interaction.

Formatting Column Content In Siebel Answers

Use the Edit Format dialog box (and the options on the Value Format tab of the Column Properties dialog box) to choose font, cell, border, and advanced style formatting options for column data that is shown inside a cell in a tabular format, such as a table or pivot table. You can also choose settings for table and column headings.

NOTE: The advanced style formatting options are for use by users who know how to work with cascading style sheets.

If you are overriding the default formatting properties for a column, your selections are static. If you are specifying conditional formatting properties for a column, your selections apply only if the condition is met.

The selections for horizontal and vertical alignment are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

If you will save the settings as system defaults, the location must be accessible to all users. For more information, see "Saving Your Siebel Answers Column Property Settings as the System-Wide Defaults" on page 64.

1   In the Font area, make your selections for font family, size, color, style (such as bold), and any effects to apply (such as underlining).

2 In the Cell area, make your selections for alignment.

■ For horizontal alignment, choose one of the options described in the following table.

Option	Usage Notes
Left	Select this option to left justify the data. This is the most common justification for text data.
Right	Select this option to right justify the data. This is the most common justification for numeric data.
Center	Select this option to center the data.
Default	Select this option to retain the default data alignment associated with this column.

■ For vertical alignment, choose one of the options described in the following table.

Option	Usage Notes
Top	Select this option to align the data to the top of the table cell.
Bottom	Select this option to align the data to the bottom of the table cell.
Center	Select this option to align the data to the middle of the table cell.
Default	Select this option to retain the default vertical alignment associated with this column.

3 In the Cell area, make your selection for an image to display inside the cell by clicking the Image button.

The Graphics dialog opens.

■ If you do not want to include an image, click the No Image option.

■ To include a custom image, click the Custom Image option and specify the appropriate path in the text box.

The image should be one that is accessible to all users who will view the results. Custom images can be used for both conditional and unconditional results.

■ To include an image distributed with Siebel Answers, use the graphics selection window and make your selection by clicking the radio button next to the image.

The window shows images that are useful in conditional formatting, such as meters and trend arrows. The left pane shows the categories of images. When you click on an image category, the right pane shows the images in that category.

■ To specify the location of the image within the cell, use the Image Placement drop-down list and select one of the options described in the following table.

Option	Usage Notes
Default	Select this option to display any images in the default position, which is usually to the left of the column data or heading.
Images Left	Select this option to display any images to the left of the column data or heading.
Images Right	Select this option to display any images to the right of the column data or heading.
Images Only	Select this option to display only the image, and not the column data or heading.

4 In the Cell area, make your selection for a background color for the cell.

5 In the Border area, make your selections for the border position, color, and style of the cell.

6 To override style and class elements specified in Siebel Analytics style sheets, make your selections in the Advanced Style Options (CSS) area:

a Click the settings you want to use.

b Provide the location of the class, style, or style sheet.

7 Click OK when you are done.

Applying Conditional Formatting to Column Content in Siebel Answers

In tables and pivot tables, conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show below-quota sales figures in a certain color, or display an image such as a trophy next to the name of each salesperson who exceeds quota by a certain percent.

You do this by selecting one or more columns in the request to use, specifying the condition to meet, and then making selections for font, cell, border, and style sheet options to apply when the condition is met. The conditional formats can include colors, fonts, images, and so on, for the data and for the table cell that contains the data. The steps to specify a condition are very similar to those used to create filters.

You can add multiple conditions so that the data and the table cell are displayed in one of several formats, based upon the value of the data. For example, below-quota sales can be displayed in one color, and above-quota sales can be displayed in another color.

Several subtle conditional formatting differences exist between traditional tables and pivot tables. Conditional formats that format one column based on the value of another column are not reflected in a pivot table, but are reflected in a standard table. For example, setting the color of a region name based on the sales in that region has no effect in a pivot table. However, setting the color of the sales data based on the value of the sales data is reflected in a pivot table, as is setting the color of the region name based on the actual name; for example, displaying a value of Eastern Region in bold colored text.

NOTE: In pivot tables, conditions are evaluated against the values as calculated or aggregated by the pivot table. Conditional formatting is applied based on the underlying value, even if you choose the Show As options to show the data as percents or indexes.

Your selections apply only to the contents of the column for the request with which you are working.

To add conditional formatting to a column in a request

1 In Siebel Answers, click the Properties button for a column to open the Column Properties dialog box, and then click the Conditional Format tab.

2 Click the Add Condition button and select the desired column in the request for use in constructing the condition.

The Create/Edit Filter dialog box opens.

NOTE: When you access the Create/Edit Filter dialog box from the Conditional Format tab, the dialog box shows only the options that apply to conditional formats. For example, the Operator drop-down list shows the subset of operators that are used in conditional formats.

For information about using the Create/Edit Filter dialog box, see "Using Column Filters in a Siebel Analytics Request" on page 39.

When you click OK at the Create/Edit Filter dialog box, the Edit Format dialog box appears.

3 Make your choices for font, cell, border, image, and advanced style formatting options.

For more information, see "Formatting Column Content In Siebel Answers" on page 60.

NOTE: If you specify an image as part of the conditional formatting, it appears conditionally in the results.

4 Click OK when you are done to return to the Column Properties dialog box.

5 Click OK if you are done, or specify another condition to include.

The Column Properties dialog box shows the condition, and the conditional formatting to apply.

Columns are evaluated in the order that they are listed.

6 To reorder a column, click the Move Up or Move Down buttons.

7 To delete a column from the condition, click the Delete button.

8 To edit a condition or a conditional format, click it.

Example of Applying Conditional Formatting to Siebel Analytics Results
The following example describes how conditional formatting can be applied to results.

Suppose a request includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You could apply conditional formatting to show the following:

■ One image to indicate a low rank for columns that contain 1, 2, or 3.

■ Another image to indicate an average rank for columns that contain 4, 5, 6, or 7.

■ A third image to indicate a high rank for columns that contain 8, 9, or 10.

At the Graphics dialog box, selecting the Images Only image placement option would cause the columns to appear with only images, and not the ranking numbers, in the results.

Saving Your Siebel Answers Column Property Settings as the System-Wide Defaults

If your user ID has the appropriate permissions, you can save your settings in the Value Format tab, the Column Format tab, and the Conditional Format tab of the Column Properties dialog box for use as the system-wide defaults for this particular column, or for columns of this particular data type. Anyone who uses this column or columns of this data type in subsequent requests will use the settings in these tabs by default.

To save your settings as the system-wide defaults
■ At the Column Properties dialog box in Siebel Answers, click the Save button and make your selection.

   NOTE: The Save button is available only to users with the appropriate permissions.

Using Custom Date/Time Format Strings in Siebel Answers

Custom date/time format strings provide additional options for formatting columns that contain timestamps, dates, and times. This section contains the following topics:

■ "Siebel Answers General Custom Format Strings" on page 65

■ "Siebel Answers ODBC Custom Format Strings" on page 66

■ "Siebel Answers Custom Format Strings for Integral Fields" on page 66

■ "Siebel Answers Custom Format Strings for Conversion into Hours" on page 67

■ "Siebel Answers Custom Format Strings for Conversion into Hours and Minutes" on page 68

■ "Siebel Answers Custom Format Strings for Conversion into Hours, Minutes, and Seconds" on page 69

To enter a custom date/time format string in Siebel Answers

1 From the Criteria tab in Siebel Answers, click the Format Column button for a column that contains a timestamp, a date, or a time.

The Column Properties dialog box opens.

2 Select the following option in the Data Format area:

Override Default Data Format

3 In the Date Format field, select Custom from the drop-down list.

4 In the Custom Date Format field, type the custom format string exactly as shown in the following tables, including left and right bracket characters ([ ]).

NOTE: You must type the custom format string into the Custom Date Format field. Custom format strings are not available for selection from the drop-down list.

Siebel Answers General Custom Format Strings

Table 7 shows the general custom format strings and the results they display. These allow the display of date/time fields in the user's locale.

Table 7. General Custom Format Strings

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. This formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. This formats the date in the locale's long date format and the time in the locale's time format.

Table 7. General Custom Format Strings

General Format String	Result
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. This formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

Siebel Answers ODBC Custom Format Strings

Table 8 shows the ODBC standard typed custom format strings and the results they display. These display date/time fields according to the ODBC standard.

Table 8. ODBC Custom Format Strings

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format (4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. This formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.
[FMT:dateTyped]	Displays the word *date* and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (').
[FMT:timeTyped]	Displays the word *time* and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters (').
[FMT:timeStampTyped]	Displays the word *timestamp* and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (').

Siebel Answers Custom Format Strings for Integral Fields

Table 9 shows the custom format strings that are available when working with integral fields. These allow the display of month and day names in the user's locale.

Integral fields hold integers that represent the month of the year or the day of the week. For months, 1 represents January, 2 represents February, and so on, with 12 representing December. For days of the week, 1 represents Sunday, 2 represents Monday, and so on, with 7 representing Saturday.

Table 9. Format Strings for Integral Fields

Integral Field Format String	Result
[MMM]	Displays the abbreviated month name in the user's locale.
[MMMM]	Displays the full month name in the user's locale.
[DDD]	Displays the abbreviated day of the week in the user's locale.
[DDDD]	Displays the full day of the week in the user's locale.

Siebel Answers Custom Format Strings for Conversion into Hours

Table 10 shows the custom format strings that can be used to format data into hours. These can be used on the following kinds of fields:

■ Fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

■ Fields where the output is in [FMT:timeHour] format, described in Table 7 on page 65. (This format displays the hour field only in the locale's format, such as 8 PM.)

Table 10. Format Strings for Conversion into Hours

Data Conversion Format String	Result
[FMT:timeHour]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and formats the number of hours into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 2 AM, and a value of 12.24 as 12 PM.
[FMT:timeHour(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and formats the number of minutes into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 12 AM, and a value of 363.10 as 06 AM.
[FMT:timeHour(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and formats the number of seconds into an hh display, where hh is the number of hours. Fractional hours are dropped from the value. For example, a value of 600 is formatted as 12 AM, a value of 3600 as 1 AM, and a value of a value of 61214.30 as 5 PM.

Siebel Answers Custom Format Strings for Conversion into Hours and Minutes

Table 11 shows the custom format strings that can be used to format data into hours and minutes. These can be used on fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

They can also be used where the output is in [FMT:timeHourMin] format, described in Table 7 on page 65. (This format displays the time in the locale's time format, but omits the seconds.)

Table 11. Format Strings for Conversion into Hours and Minutes

Data Conversion Format String	Result
[FMT:timeHourMin]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 12 is formatted as 12:12 AM, a value of 73 as 1:13 AM, and a value of 750 as 12:30 PM.
[FMT:timeHourMin(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 60 is formatted as 12:01 AM, a value of 120 as 12:02 AM, and a value of 43200 as 12:00 PM.
[FMT:timeHourMin(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the number of hours into an hh:mm display, where hh is the number of hours and mm is the remaining number of minutes. For example, a value of 0 is formatted as 12:00 AM, a value of 1.5 as 1:30 AM, and a value of 13.75 as 1:45 PM.

Siebel Answers Custom Format Strings for Conversion into Hours, Minutes, and Seconds

Table 12 shows the custom format strings that can be used to format data into hours, minutes, and seconds. These can be used on fields that contain integers or real numbers that represent time.

They can also be used where the output is in [FMT:time] format, described in "Siebel Answers General Custom Format Strings" on page 65. (This format displays the time in the locale's time format.)

Table 12. Format Strings for Conversion into Hours, Minutes, and Seconds

Data Conversion Format String	Result
[FMT:time]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 12:01:00 AM, a value of 126 as 12:02:06 AM, and a value of 43200 as 12:00:00 PM.
[FMT:time(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 1:00:00 AM, a value of 126 as 2:06:00 AM, and a value of 1400 as 11:20:00 PM.
[FMT:time(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 6.5 is formatted as 6:30:00 AM, and a value of 12 as 12:00:00 PM.

6 Working with Siebel Analytics Views in Siebel Answers

This chapter describes how to create and modify Siebel Analytics views. It contains the following topics:

About Siebel Analytics Views

This section provides general information about Siebel Analytics views and working with results. It contains the following topics:

Overview of Siebel Analytics Views

Views use the presentation capabilities of Siebel Analytics Web to help you look at results in meaningful, intuitive ways. You can add a variety of views to results, such as charts and pivot tables that allow drilling down to more detailed information, explanatory text, a list of filters that were used to limit the results, and more.

When you run a new request, Siebel Analytics initially displays results in a table, with a title preceding the table. It does this by including a title view, which displays the name of the saved request, and a table view, which displays the results in a basic table. You can customize or delete these existing views for a request, add other views, and combine and position views anywhere in the workspace.

Preparing multiple views of results can help you identify trends and relationships in data. If you are customizing results for display on a dashboard, you can preview how the combination and position of views will look when viewed on a dashboard.

You can then save the request with the collection of views. If the request is embedded in a dashboard, the dashboard page can also include elements such as links to additional requests of interest, related graphics, or news stories.

Descriptions of Siebel Analytics Views

Views are available for selection on the Results tab in Siebel Answers. The views are described in Table 13. Four frequently accessed views (compound layout, table, chart, and pivot table) are also available by clicking the appropriate view button on the Criteria tab in Siebel Answers.

NOTE: Your permissions control whether you can access all views, or specific views only.

Table 13. Siebel Analytics View Names and Descriptions

View Name	Description
Compound Layout	Use the compound layout view to assemble different views for display on a dashboard. On the Criteria tab, you can click the following button to access the compound layout view. For more information, see "Assembling Views for Display on a Dashboard Using Siebel Analytics Compound Layout View" on page 81.
Title	Use the title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results. For more information, see "Adding Titles to Results Using Siebel Analytics Title View" on page 83.

Table 13. Siebel Analytics View Names and Descriptions

View Name	Description
Table	Use the table view to show results in a standard table. Users can navigate and drill down in the results. You can add totals, customize headings, and change the formula or aggregation rule for a column. You can also control the appearance of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions. On the Criteria tab, you can click the following button to access the table view. For more information, see "Adding Tables to Results Using Siebel Analytics Table View" on page 85.
Chart	Use the chart view to drag and drop columns to a layout chart. You can customize the title, legend location, axis titles, and data labels. You can customize the size and scale of the chart, and control colors using a style sheet. Siebel Answers supports a variety of standard chart types, including bar charts, column charts, line charts, area charts, pie charts, and scatter charts. Custom chart subtypes include two-and-three-dimensional, absolute, clustered, stacked, combination, and custom. On the Criteria tab, you can click the following button to access the chart view. For more information, see "Showing Results in Charts Using Siebel Analytics Chart View" on page 86.

Table 13. Siebel Analytics View Names and Descriptions

View Name	Description
Pivot Table	Use the pivot table view to take row, column and section headings and swap them around to obtain different perspectives. You can drag and drop headings to pivot results, preview them, and apply the settings. Users can navigate through pivot tables and drill down into information. Users can create complex pivot tables that show aggregate and nonrelated totals next to the pivoted data, allowing for flexible analysis. For an interactive result set, elements can be placed in pages, allowing users to choose elements. On the Criteria tab, you can click the following button to access the pivot table view. For more information, see "Showing Results in Pivot Tables Using Siebel Analytics Pivot Table View" on page 96.
Filters	Use the filters view to show the filters in effect for a request. Filters allow you to constrain a request to obtain results that answer a particular question. For more information, see "Showing Filters Applied to Results Using Siebel Analytics Filters View" on page 103.
Column Selector	Use the column selector view to permit users to dynamically change which columns appear in results. This allows users to analyze data along several dimensions. By changing the facts, users can dynamically alter the content of the results. For more information, see "Allowing Users to Change Columns in Requests Using Siebel Analytics Column Selector View" on page 104.
Funnel Chart	Use the funnel chart view to show a three-dimensional chart that represents target and actual values using volume, level and color. It is useful for depicting target values that decline over time, such as a sales pipeline. For more information, see "Showing Results in a Funnel Chart Using Siebel Analytics Funnel Chart View" on page 105.
Narrative	Use the narrative view to show the results as one or more paragraphs of text. You can type in a sentence with placeholders for each column in the results, and specify how rows should be separated. You can incorporate custom HTML or JavaScript to specify how information appears. For more information, see "Adding Narrative Text to Results Using Siebel Analytics Narrative View" on page 106.

Table 13. Siebel Analytics View Names and Descriptions

View Name	Description
Ticker	Use the ticker view to show the results of the request as a ticker or marquee, similar in style to the stock tickers that run across many financial and news sites on the Internet. You can control what information is presented and how it scrolls across the page. For more information, see "Showing Results in a Scrolling Ticker Using Siebel Analytics Ticker View" on page 108.
Static Text	Use the static text view to include static text in the results. You can use HTML to add banners, tickers, ActiveX objects, Java applets, links, instructions, descriptions, graphics, and so on, in the results. For more information, see "Adding Markup Text to Results Using Siebel Analytics Static Text View" on page 111.
No Results	The no results view allows you to specify explanatory text to appear if the request does not return any results. For more information, see "Alerting Users to No Data Using Siebel Analytics No Results View" on page 114.
Logical SQL	Use the logical SQL view to show the SQL generated for the request. This view is useful for trainers and administrators, and is usually not included in results for typical users. You cannot modify this view, except to delete it. For information about working with the logical SQL view, see "Showing the Logical SQL for a Request Using Siebel Analytics Logical SQL View" on page 114.
Create Segment	The create segment view is for users of the Siebel Marketing Version 7.7 operational application. Use it to display a Create Segment link in the results. Users can click this link to create a segment in their Siebel Marketing operational application, based on the results data. For information about working with the create segment view, see "Creating Segments in Siebel Marketing Using Siebel Analytics Create Segment View" on page 115.
Create Target List	The create target list view is for users of Siebel Industry Applications, Version 7.7. Use it to create a Create Target List link in the results. Users can click this link to create a target list, based on the results data, in their Siebel operational application. For information about working with the create target list view, see "Creating Lists of Contacts and Accounts Using Siebel Analytics Create Target List View" on page 116.

Formatting Data Types and Configuring Data-Driven Navigation Using Siebel Analytics Custom Formatters

Siebel Analytics custom formatters allow you to format data types for display, such as showing dates in the formats mm/yy, or yyyy mm, or yyyy-mm-dd, and so on. When combined with SQL CASE functions, custom formatters allow you to add graphical indicators such as stop lighting, voting bars, scorecards, and more.

Custom formatters also allow data-driven navigation to related requests and content. Data-driven navigation using custom formatters is supported from the table and pivot table views.

For information about custom formatters, see "Using Column Formatting Functions in Siebel Answers" on page 57.

Drilling Down on Results in Siebel Analytics

If the Siebel Analytics Server administrator set up dimensional level hierarchies for the subject area, users can drill down on data in charts, tables and pivot tables. For more information, see *Siebel Analytics Server Administration Guide*.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Performing Common Tasks When Working with Siebel Analytics Views

When you are working with the various result views in Siebel Answers, you can perform some tasks, such as accessing the compound layout view or previewing a view. This section provides the procedures to perform these common tasks. It contains the following topics:

- "Saving a Siebel Analytics View" on page 77

- "Printing a Siebel Analytics View" on page 77

- "Making a Copy of a Siebel Analytics View" on page 78

- "Previewing How a Siebel Analytics View Will Appear on a Siebel Intelligence Dashboard" on page 78

- "Deleting a Siebel Analytics View" on page 79

- "Refreshing the Results in a Siebel Analytics View" on page 79

- "Creating a New Request While Working with a Siebel Analytics View" on page 79

- "Opening a Saved Request While Working with a Siebel Analytics View" on page 80

- "Accessing the Compound Layout View from Another Siebel Analytics View" on page 80

- "Customizing a Siebel Analytics View for Delivery to Siebel Delivers Users" on page 80

Saving a Siebel Analytics View

In Siebel Answers, you can save the view with which you are working at any time.

To save a Siebel Analytics view

1 Click the following button near the top of the workspace:

The Choose Folder dialog box appears.

2 Choose a personal or shared folder in which to save the view.

To specify a subfolder, perform one of the following actions:

■ Navigate to it.

■ Click Create Folder to create a new subfolder.

■ Type the path in the Folder box.

3 Type a descriptive name for the view.

The name will appear when a user pauses the mouse on the request in the selection pane.

4 (Optional) Type a description for the view.

Descriptions are displayed when Siebel Analytics administrators use the Catalog Manager.

5 Click OK.

Printing a Siebel Analytics View

In Siebel Answers, you can print the view with which you are working using HTML or Adobe PDF (Portable Document Format). Adobe Reader 6.0 or greater is required to print using Adobe PDF.

NOTE: The HTML method of printing relies on the print handling capabilities of your browser. If you do not get the results you want, choose PDF to open and then print the dashboard or request.

To print a Siebel Analytics view

1 Click the following button near the top of the workspace:

2 Choose HTML or PDF.

■ For HTML, a new window shows the selected item.

Choose File > Print on the browser menu.

■ For PDF, an Adobe PDF window shows the selected item.

Use the options available in the Adobe PDF window to save or print the file.

Making a Copy of a Siebel Analytics View

In Siebel Answers, you can duplicate a view to create a copy of it. Duplicating a view is useful when you want to make changes to it while preserving the original view, or when you want create a new view based on an existing view.

The duplicated view name has the numeral 2 appended to it. You can change the name when you save the view.

To duplicate a Siebel Analytics view

1 From any view in Siebel Answers, click the following button near the top of the workspace:

2 Choose Duplicate View from the list.

The duplicated view appears in the workspace.

Previewing How a Siebel Analytics View Will Appear on a Siebel Intelligence Dashboard

In Siebel Answers, you can preview a Siebel Analytics view to see how it will appear on a dashboard. When you preview the compound layout view, you can see how the collection of views will appear.

When you are working with views in Siebel Answers that show results data, such as the table and pivot table views, you can also see the results as you work with the view.

To preview a Siebel Analytics view as it will appear on a dashboard

■ Click the following button to near the top of the workspace:

The dashboard preview appears in a new window.

To see the results as you work with the view

1 Select the option Display Results.

2 Click the Display Results link to view the results.

Deleting a Siebel Analytics View

In Siebel Answers, you can delete the view with which you are working at any time.

To delete a Siebel Analytics view

1 Click the following button near the top of the workspace:

2 Choose Delete View from the list.

The workspace displays either the compound layout view or another view.

Refreshing the Results in a Siebel Analytics View

When you are working with views in Siebel Answers that show results data, such as the table and pivot table views, you can refresh the results of the current request. Refreshing results is useful if you make a change such as adding a filter that limits results and you want to see the effects of your change.

To refresh the results of the current request in a Siebel Analytics view

1 Click the following button near the top of the workspace:

For information about how the refresh feature works, see "Refreshing a Siebel Intelligence Dashboard or Siebel Analytics Request" on page 17.

Creating a New Request While Working with a Siebel Analytics View

In Siebel Answers, you can create a new request while you are working with a view for the current request.

To create a new Siebel Analytics request

1 Save the view with which you are working.

If you do not save the current view, any changes you made to it are discarded.

2 Click the following button near the top of the workspace:

3 Click a subject area in the list to select it.

4 The workspace displays the Criteria tab, where you can create the new request.

Opening a Saved Request While Working with a Siebel Analytics View

In Siebel Answers, you can work with a previously saved request while you are working with a view for the current request.

To open a saved Siebel Analytics request

1 Save the view with which you are working.

If you do not save the current view, any changes you made to it are discarded.

2 Click the following button near the top of the workspace:

3 In the Open dialog box, navigate to the request and click OK.

The workspace displays the Criteria tab, where you can modify the new request.

Accessing the Compound Layout View from Another Siebel Analytics View

When you are working with a view in Siebel Answers, you can access or return to the compound layout view at any time.

To access or return to the Siebel Analytics compound layout view

1 Click the following button near the top of the workspace:

The compound layout view appears in the workspace. The view that you were working with appears in the workspace at the compound layout view, together with any other views.

Customizing a Siebel Analytics View for Delivery to Siebel Delivers Users

Siebel Analytics automatically formats delivery content based on the destinations specified at the Destinations tab in Siebel Delivers. If you want to have manual control of a view's format for a particular destination, you can use the Specialize View feature in Siebel Answers to override the Siebel Analytics format. You can specialize an entire compound layout view or only certain views. The override remains in force until the specialized view is removed.

To specialize a Siebel Analytics view for delivery

1 Click the following button near the top of the workspace:

2 Choose Specialize View, and then make a selection from the list.

■ HTML.

HTML is typically used for dashboards. A specialized HTML view has (HTML) appended to its name.

■ Delivery.

Delivery is typically used for iBot content delivered to users' delivery devices. A specialized Delivery view has (Delivery) appended to its name.

■ Text (Mobile devices)

Text is typically used for devices such as text-capable cellular phones. A specialized Text view has (Text) appended to its name.

The view changes to the specialized view.

3 Save the view.

Assembling Views for Display on a Dashboard Using Siebel Analytics Compound Layout View

This section provides the procedure to access the compound layout view and use it to assemble different views for display on a dashboard. It contains the following topics:

■ "Adding, Deleting, and Rearranging Siebel Analytics Result Views in Siebel Answers" on page 82

■ "Editing the Properties of a Siebel Analytics View in Siebel Answers" on page 82

To access the Siebel Analytics compound layout view

1 In Siebel Answers, create or modify the request with which you want to work.

2 At the Criteria tab or the Results tab, click the following button:

You can also click the Results tab and choose Compound Layout from the views drop-down list.

The compound layout view appears in the workspace.

Adding, Deleting, and Rearranging Siebel Analytics Result Views in Siebel Answers

This section provides the procedures to add, delete, and reposition views using the compound layout view in Siebel Answers.

To add a new Siebel Analytics view

1   Click the following button in the Add View area near the top of the workspace:

2   Select a view from the list.

The new view is positioned at the end of the workspace.

NOTE: To add a new table, chart, pivot table, or filters view, you can also click the appropriate button in the Add View area near the top of the workspace.

To delete a Siebel Analytics view

1   Click the following button on the view:

The view is removed from the workspace.

To rearrange a Siebel Analytics view

■   Click the move up, move down, move left, or move right buttons on the view:

The view is repositioned in the workspace.

Editing the Properties of a Siebel Analytics View in Siebel Answers

From the compound layout view, you can go directly to the appropriate screen for any view workspace.

To edit the properties of a Siebel Analytics view

■   Click the following button on the view:

The workspace changes to show the options and settings for the view.

Related Topics

Adding Titles to Results Using Siebel Analytics Title View

Use the title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results. Titles and subtitles are formatted using the style sheet in use at your organization.

A title view is always added to the results, as the first view.

To work with a Siebel Analytics title view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new title view, click the Results tab and choose Title from the views drop-down list.

■ To edit an existing title view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the title view.

The workspace shows the options and settings for the view.

2 In the Title text box, type the text to display as the title.

If you do not specify a title, the name of the saved request used as the title. For unsaved requests, the Title text box is blank.

3 If you do not want the saved name of the request to appear, clear the following check box:

Display Saved Name

4 (Optional) In the Subtitle text box, type the text to display as a subtitle.

The subtitle text will follow the actual title, on a new line.

5 If you want to add additional formatting to the title or subtitle, perform the following actions:

a Click the edit buttons to the right of the Title and Subtitle dialog boxes.

b Make your choices for font, cell and border options, and then click OK.

NOTE: If you type a new caption, it replaces the original title or subtitle.

6 If you want to provide a link to customized help or other information related to the request, type the appropriate URL in the Help URL text box.

The URL should be one that is accessible to all users who will view this request.

7 If you want to display a logo image or other graphic, specify the appropriate path in the Logo text box.

The image or graphic should be one that is accessible to all users who will view this request.

You can use a function called fmap to reference images located in the current Analytics style directory. This packages custom graphics with the style and makes them portable.

The fmap syntax is as follows:

`fmap:location/image_name`

where:

fmap:	Begins the fmap function.
location	The path to the folder in the current style directory (s_stylename), such as Images. For example:
	s_Siebel7/Images
	NOTE: Logo images and graphics located in the current style directory should all be stored in the same folder.
/	Required separator.
image_name	The name of the graphic, for example:
	newlogo.gif

The following is an example of a complete fmap command:

fmap:Images/newlogo.gif

You can also reference images stored in a folder within the current skins directory.

8 To display date and time information, perform the following actions:

a If you want to display the date or time when the request started to execute, select one of the timestamp options from the Started Time drop-down list.

b If you want to display the date or time when the request finished executing, select one of the timestamp options from the Finished Time drop-down list.

9 When you are done, you can save the request with the title view.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Adding Tables to Results Using Siebel Analytics Table View

Use the table view to show results in a standard table. Users can navigate and drill down in the results. You can add a grand total and column totals, specify custom table and column headings, and change the formula or aggregation rule for a column. You can also edit properties for a column to control the appearance and layout of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions.

A table view is always added to the results, as the second view.

NOTE: The grand total for columns with the aggregation rule Average will differ in the table and pivot table views. In the table view, the grand total for a column with an Average aggregation rule is calculated from the database (as a sum divided by a count). In the pivot table view, the grand total is the average of the rows in the result set.

To work with a Siebel Analytics table view

1   In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■   To add a new table view, click the Results tab and choose Table from the views drop-down list.

You can also add a table view by clicking the Table button at the compound layout view or at the Criteria tab.

■   To edit an existing table view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the table view.

The workspace shows the options and settings for the view.

2   To view the buttons for working with each column individually, select the option to show header toolbars.

3   To specify the sort order for one or more columns that appear in a request, click the Order By button for a column.

You can order results by more than one column. If you choose more than one column, the order is shown on the Order By button. For more information about sorting, see "Specifying the Sort Order for Columns in Siebel Analytics Requests" on page 32.

4   To specify totals, perform the following actions:

■   To add a grand total, click the Grand Totals button at the top of the workspace.

■   To add totals for an individual column, click the Total By button for that column.

NOTE: The Total By button is available only for columns that can be totaled.

5   To add custom headings or edit the formula for a column, click the Edit Formula button.

The Edit Column Formula dialog box appears, where you can perform the following actions:

■   To specify custom headings, select the option Custom Headings and type new heading text into the appropriate location.

- ■ To edit the formula for the column, type it into the Column Formula area. For more information, click the help button.

- ■ To change the aggregation rule for the column, make a selection from the drop-down list.

6 To edit the properties for a column, or to specify formatting to apply if the contents of the column meet certain conditions, click the Format Column button.

The Edit Column Format dialog box appears, where you can make your selections:

- ■ For information about formatting columns and adding navigation as part of the column format, see "Using Column Formatting Functions in Siebel Answers" on page 57.

- ■ For information about adding conditional formatting, see "Applying Conditional Formatting to Column Content in Siebel Answers" on page 62.

7 When you are done, you can save the request with the table view.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Showing Results in Charts Using Siebel Analytics Chart View

Use the chart view to position columns on a chart, and to customize the title, legend location, axis titles, data labels, size, and scale. You can select the chart graph, such as a line chart or a bar chart; the chart subtype, such as two-dimensional; and the style for columns, such as the shape and fill pattern. You can also set borders and colors, and control other chart characteristics. Results are drillable in the Chart view.

Chart graph choices include area charts, bar charts, bubble charts, line charts, and other types. Chart subtypes include 2D, 3D, absolute, clustered, stacked, combination, and custom.

This section explains how to work with charts. It contains the following topics:

- ■ "Description of Siebel Analytics Chart Graphs" on page 87
- ■ "Description of Siebel Analytics Chart View Buttons" on page 89
- ■ "General Steps to Add or Modify a Siebel Analytics Chart View" on page 90
- ■ "Specifying General Chart Properties in Siebel Analytics Chart View" on page 91
- ■ "Controlling the Display of Grid Lines in Siebel Analytics Chart View" on page 92
- ■ "Specifying the Location of the Legend in Siebel Analytics Chart View" on page 92
- ■ "Setting Colors for Background, Text, and Borders in Siebel Analytics Chart View" on page 92
- ■ "Selecting the Columns to Display as Axes in Siebel Analytics Chart View" on page 93
- ■ "Setting Axis Scaling Options in Siebel Analytics Chart View" on page 94

■ "Specifying Axis Titles and Labels in Siebel Analytics Chart View" on page 94

■ "Specifying What Happens When a User Clicks a Chart in Siebel Analytics" on page 95

NOTE: Siebel Analytics uses a third-party charting engine. The type of the chart, its size, and the number of elements charted can affect whether axes or legends appear. This is constrained by the amount of available space on the Web browser page. Sometimes, by adjusting the width and height controls, it is possible to get undisplayed axes and legend values to appear.

Description of Siebel Analytics Chart Graphs

Table 14 shows the chart graphs available from the Graph drop-down list and describes their uses. Not all chart graphs are appropriate for all types of data. The default chart graph is a vertical bar chart.

Table 14. Siebel Analytics Chart Graph Selections

Chart Graph Type	Description
Area	An area graph is similar to a line graph, but with the areas under the lines filled in. Area graphs show the percentage of the whole that each variable comprises. Area graphs are useful for observing changes in cumulative value or percentage over time; for example, by comparing groups on certain measurements such as outcome, and displaying group trends.
Horizontal Bar	A horizontal bar graph can be used to compare facts by showing bars in a horizontal direction. Horizontal bar graphs are useful for comparing differences among like items; for example, competing product sales, same product sales over different time periods, or same product sales over different markets.
Bubble	A bubble graph is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the x-axis. Another value is represented by the location of the circle on the y-axis. The third value is represented by the relative size of its circle. Bubble graphs are useful for plotting data with three variables, and for displaying financial data over a period of time. **TIP:** To create a bubble graph, plot one fact on the x-axis, another fact on the y-axis, and a third fact on the bubble radius axis. These three facts are plotted for selections on the Level axis.
Vertical Bar	A vertical bar graph compares facts using vertical columns. Vertical bar graphs are useful for comparing differences among like items.

Table 14. Siebel Analytics Chart Graph Selections

Chart Graph Type	Description
Line	A line graph can be used to plot multiple facts.
	Line graphs are useful for showing patterns and trends in data.
Line Bar Combo	A line bar combination graph plots two sets of data with different ranges, one set as bars, and one set as lines overlaid on the bars.
	Line bar combination charts are useful for showing trend relationships between data sets.
	TIP: You can specify any mix of bars and columns, but there must be one of each. Specifying all columns as lines works, but if you want only bars, use a bar chart. (When only bars are selected for this chart type, some column selections may be drawn as lines.)
Pareto	A pareto graph is a form of bar chart and line chart that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages.
	Pareto graphs are useful for identifying significant elements, such as best and worst or most and least.
Pie	A pie graph shows data sets as percentages of a whole.
	Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.
Radar	A radar graph plots the same information as a bar graph, but instead displays data radiating from the center of the graph. Each data element has its own value axis.
	Radar graphs are useful for examining overlap and distribution.
Scatter	A scatter graph displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. This allows you to plot large numbers of data points and observe the clustering of data points.
	Scatter graphs are useful for observing relationships and trends in large data sets.
	TIP: To create a scatter graph, plot one fact on the x-axis and plot another fact on the y-axis. These facts are plotted for selections on the Level axis.

Your selection for the chart graph determines the chart subtypes that are available from the Type drop-down list. Not all chart types have subtypes; for example, bubble and radar graphs have no subtypes. Charts subtypes default to the 3D option, if available. Depending on the chart type selection, subtype options may include the following:

■ Area charts: 3D and 2D

■ Bar charts: 3D, 2D, 3D Stacked, and 2D Stacked

■ Line charts: 3D and 2D

■ Pareto charts: 3D and 2D

■ Pie charts: 3D and 2D

■ Scatter charts: Scatter, and Scatter with Lines

Your selection for the chart type also determines the styles that are available from the Style drop-down list. Not all chart types have styles. The style defaults to solid fill, if available. Depending on the chart type selection, styles for charts may include the following:

■ Area charts: Solid Fill and Pattern Fill

■ Bar charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill

■ Line charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill

■ Pareto charts: Rectangle, Cylinder, Gradient, Triangle, Diamond, Pattern Fill

■ Pie charts: Solid Fill and Pattern Fill

Description of Siebel Analytics Chart View Buttons

The buttons at the top of the chart view page provide access to various chart settings. Table 15 describes the chart view buttons and settings.

Table 15. Siebel Analytics Chart View Buttons and Settings

Chart View Button	Description
	Sets general properties for the chart, such as its title, whether data labels appear, and the chart size. For more information, see "Specifying General Chart Properties in Siebel Analytics Chart View" on page 91.
	Controls the display of axis title and data labels at the bottom of the chart and to the left of the chart. For more information, see "Specifying Axis Titles and Labels in Siebel Analytics Chart View" on page 94.
	Sets the axis scaling properties, the number of tick marks, and the scale type. For more information, see "Setting Axis Scaling Options in Siebel Analytics Chart View" on page 94.

Table 15. Siebel Analytics Chart View Buttons and Settings

Chart View Button	Description
	Controls the display of grid lines on the chart. For more information, see "Controlling the Display of Grid Lines in Siebel Analytics Chart View" on page 92.
	Sets the location of the legend, and provides options for resizing the legend. For more information, see "Specifying the Location of the Legend in Siebel Analytics Chart View" on page 92.
	Sets background, text, and border colors. For more information, see "Setting Colors for Background, Text, and Borders in Siebel Analytics Chart View" on page 92.
	Controls how users interact with the chart when they click it, such as drilling down to lower-level data, or navigating automatically to a related saved request or a Web site. For more information, see "Specifying What Happens When a User Clicks a Chart in Siebel Analytics" on page 95.

General Steps to Add or Modify a Siebel Analytics Chart View

The following procedure provides the basic steps to add or modify a chart view.

NOTE: If you select a chart graph that is incompatible with the results, no results are shown.

To add or modify a Siebel Analytics chart view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new chart view, click the Results tab and choose Chart from the views drop-down list.

   You can also add a chart view by clicking the Chart button at the compound layout view or at the Criteria tab.

■ To edit an existing chart view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the chart view.

The workspace shows the options and settings for the view.

2 Make your selections for the chart graph, subtype, and style.

Your selection for the graph type determines the available choices for the subtype and style. When no subtypes or styles are available, the drop-down lists become unavailable.

As you make selections from the drop-down lists, the chart view changes to reflect your selections.

3 To add a column to the chart, click it in the selection pane, or add it at the Criteria tab.

4 To delete a column from the chart, click the Criteria tab and click the Delete button for the column.

5 Use the buttons at the top of the chart view page to specify additional chart settings.

6 To see the effects of your changes, click the Redraw button.

You can click the Redraw button at any time to refresh the chart view.

7 To remove changes and start from the original chart, click the Clear button.

8 To resize the chart, use the vertical and horizontal slide bars.

9 When you are done, you can save the request with the chart view.

Specifying General Chart Properties in Siebel Analytics Chart View

You can set general properties for the chart, such as a title and whether data labels appear. You can also set the chart size as a percentage of the available space.

Data labels are enabled by default for selected 2D chart types. Data labels have no effect on charts like 3D bar and column.

The default for chart size is to scale all elements of the existing chart, including height and width, to fit the available space. The chart's height and width remain proportional to each other when the size of the chart changes. The chart automatically resizes chart elements based on the space available within the chart.

NOTE: The chart can expand significantly if the number of items being charted grows substantially.

For example, suppose you create a request to display the sales of three products, create a chart of the results with the product sales shown as three columns, and size the chart to occupy about 25 percent of the page. If the report is run later and six products are returned, the chart is expanded to twice its original width, or about 50 percent of the page, so that the widths of the individual columns in the chart remain constant.

The chart elements are resized as needed to fit into the chart. Using the preceding example, the chart continues to occupy about 25 percent of the page, and the columns are resized to fit in the available space.

To set general properties for a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The General dialog box appears.

2 Make your selections and click OK.

The chart view refreshes. The chart may resize to accommodate your selections.

Controlling the Display of Grid Lines in Siebel Analytics Chart View

You can control whether grid lines display on the chart, and specify grid line colors.

To control the display of grid lines on a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The Grid Lines dialog box appears.

2 Make your selections and click OK.

The chart view refreshes.

Specifying the Location of the Legend in Siebel Analytics Chart View

You can specify the location of the legend, and set options for resizing the legend.

To specify the location of the legend on a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The Legend dialog box appears.

2 Make your selections and click OK.

The chart view refreshes. The chart may resize to accommodate your selections.

Setting Colors for Background, Text, and Borders in Siebel Analytics Chart View

You can specify the color for the chart background, text, and borders.

To specify background, text and border colors on a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The Borders and Colors dialog box appears.

2 Make your selections and click OK.

The chart view refreshes.

Selecting the Columns to Display as Axes in Siebel Analytics Chart View

The column area on the left side of the chart view shows the columns that are included in the request. You can select the columns to display as the different axes in the chart. You can also indicate whether measure labels appear for factual data plotted on an axis.

The available axes can change depending on the type of chart selected from the Graph drop-down list. The chart axis buttons used in chart view are described in Table 16.

Table 16. Chart Axis Buttons Used in Siebel Analytics Chart View

Chart Axis Button	Axis
	Level axis (for scatter and bubble graphs)
	Horizontal axis
	Vertical axis (for a radar graph, this is the fact axis)
	Legend axis
	Overlay axis
	Radius axis
	Pie Values axis (for a radar graph, this is the radar axis)

To select the columns to display as the axes on a Siebel Analytics chart view

1 In the columns area to the left of the chart, click the appropriate check box for one of the axis buttons to display that column as the corresponding axis in the chart.

The axis buttons change depending on the type of graph selected from the Graph drop-down list.

2 To add a column to the chart, click it in the selection pane, and then set it as an axis.

This is equivalent to adding the column to the request at the Criteria tab.

3 To display the unit of measure on an axis, click the appropriate check box.

4 Click Redraw to refresh the chart view.

Setting Axis Scaling Options in Siebel Analytics Chart View

You can control axis scaling, the type of scale, and tick mark properties.

To specify axis scaling options for a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The Axis Scaling dialog box appears.

2 Make your selections and click OK.

For charts with numeric axes, the settings of the axis scaling options determine how the scale is selected:

■ When you select Default, the system chooses the scale and sets the axis to zero (0) for positive numbers.

■ When you select Zoom to Data Range, the system chooses the scale. It evaluates the range of values on the axis, and chooses appropriate minimum and maximum values for the scale. This is useful when charting a set of large values that are all within a small percentage of each other. The chart zooms in on the values so differences are more easily distinguished.

■ You can also manually set the axis scaling values to specific numbers.

The chart view refreshes. The chart may resize to accommodate your selections.

Specifying Axis Titles and Labels in Siebel Analytics Chart View

You can control whether axis titles and data labels display at the bottom of the chart and to the left of the chart.

NOTE: Adjusting the size of a chart can affect how the axis labels appear.

To specify an axis title on a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The Axis Titles and Labels dialog box appears.

2 Make your selections and click OK.

The chart view refreshes.

Specifying What Happens When a User Clicks a Chart in Siebel Analytics

When a user views the chart, you can specify the type of interaction to occur if the user clicks the chart. The following are the types of interactions for a chart:

■ **Drill.** Allows the user to drill down to more detailed information. This is the default interaction.

■ **Navigate.** Allows the user to navigate to another saved request, dashboard, or Web site.

■ **None.** Disables drilldown or navigation from the chart.

To specify the user interaction with a Siebel Analytics chart view

1 Click the following button at the top of the chart view page:

The Interaction dialog box appears.

2 Make your selection for the interaction.

If you want users to navigate to a Web site, type the full path into the Navigate text box.

3 Click OK.

Related Topics
"Overview of Siebel Answers" on page 23
"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Showing Results in Pivot Tables Using Siebel Analytics Pivot Table View

The pivot table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

This section provide the general steps to create a pivot table and describes additional pivot table formatting options. It contains the following topics:

■ "General Steps to Add or Modify a Siebel Analytics Chart View" on page 90

■ "Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables" on page 98

■ "Overriding Default Aggregation Rules in Siebel Analytics Pivot Tables" on page 98

■ "Adding Formatting in Siebel Analytics Pivot Tables" on page 99

■ "Showing an Item's Relative Value in Siebel Analytics Pivot Tables" on page 99

■ "Using Calculations in Siebel Analytics Pivot Tables" on page 100

General Steps for Adding or Modifying a Siebel Analytics Pivot Table View

When you add or modify a pivot table, the columns included in the request appear as elements in the pivot table template. See Table 17 on page 97 for a description of pivot table positions.

To add or modify a Siebel Analytics pivot table view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new pivot table view, click the Results tab and choose Pivot Table from the views drop-down list.

You can also add a pivot table view by clicking the Pivot Table button at the compound layout view or at the Criteria tab.

■ To edit an existing pivot table view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the pivot table view.

The workspace shows the options and settings for the view.

2 To view the pivot table template and buttons for working with each column individually, select the option to show header toolbars.

The workspace shows the pivot table template.

3 Drag and drop the request columns, which appear as elements in the pivot table, to the desired positions in the pivot table template.

4 To see a preview, select the option Display Preview.

You can click the Display Preview link to refresh the results.

5 To add a chart view next to the pivot table, select the option Chart Pivoted Results.

For information about the chart view, see "Showing Results in Charts Using Siebel Analytics Chart View" on page 86.

6 To sort the results, click the Order By button.

The button changes to indicate the sort order:

■ An up arrow indicates ascending sequence.

■ A down arrow indicates descending sequence.

For more information about sorting, see "Specifying the Sort Order for Columns in Siebel Analytics Requests" on page 32.

7 To add column and row grand totals, perform the following actions:

    a In the Measures area, click the Totals button for the row or column to be totaled.

    b Select a value.

        Depending on the position of this element, the totals for the summary data represented by the Measures elements display as a column or row. Column and row totals include labels.

        When the Totals button is dimmed, no totals will appear.

8 To work with additional options for a column, measure, or row, click the More Options button for make a selection from the drop-down list.

9 To format labels or values for a column, click the Totals button or the More Options button, and then select the appropriate format option.

For information about formatting columns, see "Adding Formatting in Siebel Analytics Pivot Tables" on page 99.

10 When you are done, you can save the request with the pivot table view.

Table 17. Siebel Analytics Pivot Table Positions

Position	Description
Pages	Provides an interactive result set that allows users to select the data they want to view. The values from the columns that appear in the Pages position are used as the initial filter criteria. The values appear in a drop-down list for selection. Based on that selection, a pivot table (composed of the Sections, Columns, Rows, and Measures defined in the pivot table) appears. For more information, see "Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables" on page 98.
Sections	Provides initial filter criteria. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows, and Measures defined in the pivot table.
Columns	Shows an element in a column orientation. Pivot tables can contain multiple columns.
Rows	Shows an element in a row orientation. Like columns, pivot tables can contain multiple rows.

Table 17. Siebel Analytics Pivot Table Positions

Position	Description
Measures	Populates the section of a pivot table that contains summary data. The elements in the Measures area are summarized based on the elements in the page, section, row, and column fields. Each value in the Measures elements represents a summary of data from the intersection of the source rows and columns. The Measure Labels element, which appears in the Columns area by default, represents the label position for the Measures columns. It also provides totaling and ordering capabilities. If there is only one measure, this element can be excluded.
Excluded	Excludes columns from the pivot table results. Any column that is added as criteria for the request after the pivot table has been created, is added as excluded.

Using Multiple Page Drop-Down Lists in Siebel Analytics Pivot Tables

When you place multiple attributes in the Pages area in the pivot table, you can create a multiple page drop-down list. Then, when users view the pivot table in a dashboard, they will see a drop-down list for each attribute, rather than a concatenated list of attributes placed in the page heading.

For example, if you place Region and Brand in the pages area, a Region drop-down list allows the user to select a particular region, and see the data for only that region, rather than seeing Region concatenated with Brand.

To create an independent drop-down list in a Siebel Analytics pivot table

1 Drag and drop your target attributes into the Pages area.

2 Click the More Options button on the second (or any subsequent) attribute in the Pages layout area.

3 Select the option Start New Page Drop Down.

The drop-down list for the attribute appears above the preview of the pivot table.

You can create drop-down lists for other attributes in the Pages area. When the report is saved, the drop-down lists will be available to users with access to the report.

Overriding Default Aggregation Rules in Siebel Analytics Pivot Tables

The default aggregation rule for a measure is specified in the Siebel Analytics repository, or by the original author of the report.

To override the default aggregation rule for a measure in a Siebel Analytics pivot table

1 Click the More Options button for the measure whose default aggregation rule you want to override.

2 Select the option Aggregation Rule, and then select the aggregation rule to apply.

The chosen aggregation rule for the measure is indicated by a check mark.

Adding Formatting in Siebel Analytics Pivot Tables

You can specify font, cell, border, and style sheet options for values and measure labels. For information about formatting columns and adding navigation as part of the column format, see "Using Column Formatting Functions in Siebel Answers" on page 57.

You can also add conditional formatting, which helps direct attention to a data element if it meets a certain threshold. To add conditional formatting to a column in a pivot table, see "Applying Conditional Formatting to Column Content in Siebel Answers" on page 62.

To add formatting in a Siebel Analytics pivot table

1 At the pivot table view, click the More Options button for the element and choose Format Values. (For a measure, the option is Format Measure Labels).

2 The Edit Format dialog box appears.

3 Make your selections and click OK.

Showing an Item's Relative Value in Siebel Analytics Pivot Tables

You can dynamically convert a stored or calculated measure on a pivot table into a percent or an index. This shows the relative value of the item, compared to the total, without the need to explicitly create a calculation for it.

For example, if you are using a pivot table to examine sales by region, you can duplicate the sales measure and view it as a percentage of the total. This allows you to see the actual sales, and the percentage of sales, that each region accounts for.

You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1. Deciding which method to use is at your discretion.

To show an item as a relative value in a Siebel Analytics pivot table

1 At the pivot table view, click the More Options button for the item you want to show as a relative value.

NOTE: The following step is optional. When you duplicate the measure in the pivot table, you can see both the total for the measure and its relative value. This eliminates the need to add the column twice on the Criteria tab to see the total and its relative value in the pivot table.

2 To duplicate the measure, select the option Duplicate Layer.

The measure appears a second time in the pivot table, with the same name. If you want to rename the measure, click More Options and select Rename.

3 Select the option Show Data As and choose Percent of or Index of, and then choose the appropriate submenu option.

NOTE: The option Show Data As is available only for items that are stored or calculated measures.

The options for Percent of and Index of are shown in the following table. For Percent of choices, the number of decimal places is dependent upon the type of measure.

Percent of or Index of	Result
Column	Shows the percentage of the column, or index value, that this value constitutes.
Row	Shows the percentage of the row, or index value, that this value constitutes.
Section	Shows the percentage of the section, or index value, that this value constitutes.
Page	Shows the percentage of the page, or index value, that this value constitutes.
Column Parent	Shows the percentage of the column parent, or index value, that this value constitutes.

Using Calculations in Siebel Analytics Pivot Tables

You can use calculations in a pivot table to obtain different views of the data. The calculations allow you to override the default aggregation rule specified in the Siebel Analytics repository, and for an existing report, the aggregation rule chosen by the author.

Table 18 describes the calculations that you can use in pivot tables.

Table 18. Siebel Analytics Pivot Table Calculations

Calculation	Description
Default	Applies the default aggregation rule as in the Siebel Analytics repository or by the original author of the report.
Sum	Calculates the sum obtained by adding up all values in the result set. Use this on items that have numeric values.
Min	Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this on items that have numeric values.
Max	Calculates the maximum value (highest numeric value) of the rows in the result set. Use this on items that have numeric values.

Table 18. Siebel Analytics Pivot Table Calculations

Calculation	Description
Average	Calculates the average (mean) value of an item in the result set. Use this on items that have numeric values. Averages on pivot tables are rounded to nearest whole number. **NOTE:** Grand total for columns with the aggregation rule Average will differ in the pivot table and table views. In the pivot table view, the grand total is the average of the rows in the result set. In the table view, the grand total for a column with an Average aggregation rule is calculated from the database (as a sum divided by a count).
First	In the result set, selects the first occurrence of the item.
Last	In the result set, selects the last occurrence of the item.
Count	Calculates the number of rows in the result set that have a nonnull value for the item. The item is typically a column name, in which case the number of rows with nonnull values for that column are returned.
Count Distinct	Adds distinct processing to the Count function. This means that each distinct occurrence of the item is counted only once.
Formula	Opens a toolbar that lets you select mathematical operators to include in the calculation.
None	No calculation is applied.

Internally, Siebel Analytics Web processes pivot table calculations as SQL SELECT statements, and performs the indicated functions on the result set. For more information about SQL functions, see *Siebel Analytics Server Administration Guide*.

Building Calculations in Siebel Analytics Pivot Tables
You can build calculations for items in the Pages, Sections, Rows, and Columns areas.

To build a calculation for an item in a Siebel Analytics pivot table

1 In the Pages, Sections, Rows, or Columns area, click the More Options button for the measure on which you want a calculation performed.

2 Select the option New Calculated Item.

The Calculated Item window appears.

3 Assign a name for the calculation in the Name field.

4 To build a calculation other than a formula, choose from the following options:

■ To build one calculation, select the function to work with from the Function drop-down list, and click on one or more items in the Values list to add them to the Function field.

■ To build multiple calculations for multiple items, type the functions and click on the item names to add them to the Function field. See "Examples of Calculations in Siebel Analytics Pivot Tables" on page 102 for examples of the kinds of calculations that you can build.

■ If you are averaging a column with a type of integer, change the formula for the column to cast it to a double (floating point) type. For example, if the current formula is x, change it to CAST(x as double).

NOTE: Averages on pivot tables are rounded to nearest whole number.

5 To build a formula, choose the Formula function.

NOTE: A formula creates a dynamic custom grouping within the pivot table. All measures referenced in a formula must be from the same logical column and must be present in the results. Formulas can be inserted into, or combined with, other calculations.

The mathematical operators become visible. The operators are shown in the following table.

Operator	Description
+	Plus sign, for an addition operation in the formula.
-	Minus sign, for a subtraction operation in the formula.
*	Multiply sign, for a multiplication operation in the formula.
/	Divide By sign, for a division operation in the formula.
$	Dollar sign, for acting upon the row position of an item in a formula.
(	Open parenthesis, to signify the beginning of a group operation in the formula.
)	Close parenthesis, to signify the ending of a group operation in a formula.

a In the Function field, build the formula by typing or clicking measure names, and clicking operators to insert them into the formula. See "Examples of Calculations in Siebel Analytics Pivot Tables" for examples of what you can do.

b Use parentheses, where appropriate.

6 When the calculation is complete, click Finished.

If any errors are detected, a message will appear. Correct the error and click Finished again.

Examples of Calculations in Siebel Analytics Pivot Tables

The examples and explanations in this section assume that you have a basic understanding of SQL and its syntax. The examples are hypothetical. Not all possible calculations are shown.

Example 1. This obtains the value of the current measure, such as dollar sales, for each of the products SoftDrinkA, SoftDrinkB, and SoftDrinkC, and adds the values together.

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

This is equivalent to selecting Sum from the Function drop-down list, and then typing or clicking 'SoftDrinkA','SoftDrinkB','SoftDrinkC' to add them to the Function field.

Example 2. This obtains the minimum current measure, such as dollars in sales, for SoftDrinkA or SoftDrinkB, whichever is lower.

```
min('SoftDrinkA','SoftDrinkB')
```

In Example 1 and Example 2, each functional calculation is performed for each item in the outer layer, such as the Product layer. For example, if Year and Product are laid out on an axis, and one of the above calculations is built on the Product layer, the results will be computed per year.

Example 3. This obtains the values for each item in the outer layer, such as Year and Product, and adds them together.

```
sum(*)
```

Example 4. This obtains the current measure, such as dollar sales, of the item from the first, second, and third rows, and sums them.

```
sum($1,$2,$3)
```

Instead of specifying a named item, such as SoftDrinkA, you can specify $n or $-n, where n is an integer that indicates the item's row position. If you specify $n, the measure is taken from the nth row. If you specify $-n, the measure is taken from the nth to the last row.

For example, for dollar sales, $1 obtains the measure from the first row in the data set, and $-1 obtains the measure from the last row in the data set.

Example 5. This adds sales of SoftDrinkA, SoftDrinkB, and SoftDrinkC.

```
'SoftDrinkA' + 'SoftDrinkB' + 'SoftDrinkC'
```

This is equivalent to the following calculation:

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

Example 6. This adds sales of SoftDrinkA with sales of diet SoftDrinkA, then adds sales of SoftDrinkB with sales of diet SoftDrinkB, and then returns the maximum of these two amounts.

```
max('SoftDrinkA' + 'diet SoftDrinkA', 'SoftDrinkB' + 'diet SoftDrinkB')
```

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Showing Filters Applied to Results Using Siebel Analytics Filters View

Use the filters view to show the filters in effect for a request. For information about adding filters to a request, see "Using Column Filters in a Siebel Analytics Request" on page 39.

To add or modify a Siebel Analytics filters view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new filters view, click the Results tab and choose Filters from the views drop-down list.

You can also add a filters view by clicking the Filters button at the compound layout view.

■ To edit an existing filters view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the filters view.

The workspace shows the filters view.

2 When you are done, you can save the request with the filters view.

Related Topics
"Overview of Siebel Answers" on page 23
"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Allowing Users to Change Columns in Requests Using Siebel Analytics Column Selector View

Use the column selector view to allow users to dynamically change which columns appear in a request. One column selector can be attached to each column in a specific request, and multiple columns (attributes) can be attached to each column selector.

To add or modify a Siebel Analytics column selector view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new column selector view, click the Results tab and choose Other Views > Column Selector from the views drop-down list.

■ To edit an existing Column Selector view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the column selector view.

The workspace shows the options and settings for the view.

2 Select the Include Selector option for each column that you want a column selector to appear.

3 Type a label for each selector and select a position for the label.

NOTE: If you do not type a label, users viewing the results will not see a label on the selector.

4 From the subject area in the selection pane, select the columns you want in the selector.

5 If you want to remove a specific choice from a column selector, click the Delete button.

To remove all choices, click the Clear Choices link.

6 When you are done, you can save the request with the column selector view.

Related Topics

Showing Results in a Funnel Chart Using Siebel Analytics Funnel Chart View

Use the funnel chart view to show results as a three-dimensional chart that represents target and
actual values and levels by color. Typically, funnel charts are used to graphically represent data that
changes over different periods or stages. For example, funnel charts are often used to represent the
volume of sales over a quarter.

Funnel charts are well suited for showing actual compared to targets for data where the target is
known to decrease (or increase) significantly per stage, such as a sales pipeline. You can click on
one of the colored areas to drill down to more detailed information.

To add or modify a Siebel Analytics funnel chart view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform
one of the following actions:

■ To add a new funnel chart view, click the Results tab and choose Other Views > Funnel Chart
from the views drop-down list.

■ To edit an existing funnel chart view, click the Results tab, choose Compound Layout from
the views drop-down list, and then click the Edit View button for the funnel chart view.

The workspace shows the options and settings for the view.

2 Make your selections for the fields in the workspace.

The following table describes the fields.

Funnel Chart View Workspace Field	Description
Chart Title	Specifies the title to display when the chart appears.
Stage	Identifies the stage to represent, from the drop-down list.
Actual Value	Specifies the actual value for the stage, from the drop-down list.
Target Value	Specifies the target value for the stage, from the drop-down list.
Target value for final stage only	Indicates whether the target value should appear for each stage or for the final stage only.

Funnel Chart View Workspace Field	Description
Factor required to meet target	Identifies the factors required to meet targets.
Minimum Threshold	Specifies the minimum threshold.
Maximum Threshold	Specifies the maximum threshold.
Size	Specifies the size.
Force standard shape and equal stage widths	Indicates whether Siebel Analytics will automatically force the display.
Interaction	Indicates the level of interaction allowed in the chart. Choices include None, Drill, and Navigate.

3 When you are done, you can save the request with the funnel chart view.

Related Topics

Adding Narrative Text to Results Using Siebel Analytics Narrative View

Use the narrative view to add one or more paragraphs of text to appear with the results. Narrative text is useful for providing information such as context, explanatory text, or extended descriptions. You can type a sentence with placeholders for each column in the results and specify how rows should be separated.

NOTE: To include a line break, enter the appropriate row separator tag. Pressing Enter does not result in multiple lines of text.

In the narrative view, the following characters are reserved characters:

@   (at sign, unless used as a column placeholder)

[(left bracket)

]   (right bracket)

'   (single quote)

\   (back slash)

NOTE: If you want to include a reserved character, precede it with a backward slash character (\) to escape it. For example, to include a backward slash character in narrative text, type \\.

To add or modify a Siebel Analytics narrative view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform
one of the following actions:

■ To add a new narrative view, click the Results tab and choose Other Views > Narrative from
the views drop-down list.

■ To edit an narrative view, click the Results tab, choose Compound Layout from the views
drop-down list, and then click the Edit View button for the narrative view.

The workspace shows the options and settings for the view.

2 Make your selections for the fields in the workspace.

The following table describes the fields.

Narrative View Workspace Field	Comments
Prefix	Specifies the header for the narrative. This text appears at the beginning of the narrative.
Narrative	Indicates the narrative text that will appear for each row in the results. Use @n to include the results from the designated column in the narrative. For example, @1 inserts the results from the first column in the narrative, and @3 inserts the results of the third column.
Row Separator	Specifies a row separator tag. To use a separator other than the default for the format, clear the following check box: Use default row separator Then, you can enter the desired row separator in the Row Separator text box.
Postfix	Specifies the footer text that appear at the bottom of the narrative. **NOTE:** To display the footer information on a separate line from the actual narrative text, include markup tags in the postfix text box. Make sure that the narrative ends in a row separator, or that the footer begins with a row separator.

3 When you are done, you can save the request with the narrative view.

Narrative View Example

A user creates a request that returns the region name in the second column as part of the result set.
The user wants the narrative view to appear as shown in the following example, with introductory
text and each region listed on a new line:

This report shows your sales by region. The regions are:

East Region
West Region

The following table lists and describes the user's narrative view entries:

Field	Entry	Explanation
Prefix	This report shows your sales by region. The regions are: 	Prefixes the narrative with the following text: This report shows your sales by region. The regions are: The text is formatted to appear in bold type and is followed by two line breaks.
Narrative	@2	Includes the results from the second column (the region name) in the narrative text.
Row Separator	 	Starts each row of the narrative text on a new line.

Related Topics

Showing Results in a Scrolling Ticker Using Siebel Analytics Ticker View

A ticker displays the results of a request as a marquee (moving results that scroll across the page). You can customize the size of the scroll area, the speed and direction in which the results scroll, and other display settings.

NOTE: If your Web browser does not support moving text, the results will appear, but they will not scroll across the page.

To add or modify a Siebel Analytics ticker view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new ticker view, click the Results tab and choose Other Views > Ticker from the views drop-down list.

■ To edit an existing ticker view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the ticker view.

The workspace shows the options and settings for the view.

2 To generate default settings for the most commonly used fields, click the Set Defaults button.

CAUTION: If you click the Set Defaults button after entering values in other fields, your entered values are cleared.

3 To clear all fields, click the Clear Fields button.

NOTE: After you clear all fields, you can click the Set Default button to restore default settings for the most commonly used fields.

4 Make your selections for the fields in the workspace.

The following table describes the fields.

Ticker View Workspace Field	Description
Behavior	Specifies how the results move in the ticker: ■ **Scroll.** The results start hidden, scroll on to the page, then off the page before repeating. ■ **Slide.** The results start hidden, scroll on to the page, then stop once touching the other side. ■ **Alternate.** The results bounce back and forward inside the marquee.
Direction	Specifies the direction the results move in the ticker (left, right, down, or up).
Width	Specifies the width of the ticker, either in pixels, or as a percentage of the page width. For example, a value of 200 indicates a width of 200 pixels, and a value of 25% indicates a width of one-quarter of the page.
Height	Specifies the height of the ticker, either in pixels, or as a percentage of the page height. For example, a value of 200 indicates a height of 200 pixels, and a value of 25% indicates a height of one-quarter of the page.

Ticker View Workspace Field	Description
Beginning Text	Specifies any optional text or graphics to display at the beginning of each redraw of the results. You can use HTML to format the text.
	If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:
	c:\mycomputer\temp\report.gif
	If the image is for use in a shared environment, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:
	\\ALLUSERS\graphics\report.gif
Row Format	Specifies the HTML to use in formatting the rows in the results.
	To include the results from a designated column, use @n. For example, @1 inserts the results from the first column, and @3 inserts the results of the third column.
Row Separator	Specifies the character that separates one row from another. The default character is a vertical bar (	).
Column Separator	Specifies the character that separates one column from another. The default character is a vertical bar (	).
Ending Text	Specifies any optional text or graphics to display at the end of each redraw of the results. You can use HTML to format the text.
	If you include an image, make sure you know where the image is located. If the image is for your use only, the following is a sample location:
	c:\mycomputer\temp\report.gif
	If the image is for use in a shared environment, it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:
	\\ALLUSERS\graphics\report.gif

5 To specify additional options, perform the following actions:

a Click the Advanced button.

The Advanced Ticker Options dialog box appears.

b Make your selections for the advanced options and click OK.

The following table describes the advanced options.

Advanced Options in the Ticker View Workspace	Description
# of Loops	Specifies the number of times that the results will scroll. The default is an infinite number of times. You must specify a whole number.
Scroll Amount	Sets the number of pixels between successive redraws of the results.
Scroll Delay	Specifies the number of milliseconds between successive redraws of the results.
Background Color	Specifies the color to use for the background. Depending on what your browser supports, you can type a color name such as yellow or blue, or use the 6-digit hexadecimal format, such as #AFEEEE for pale turquoise. (You can omit the number sign character from the hexadecimal format.)
Additional Marquee Attributes	Specifies other marquee options that your browser may support, such as ALIGN="top | middle | bottom" to align the ticker to the top, middle or bottom of the text around it. You can also add HTML to further customize the look of the ticker.

6 When you are done, you can save the request with the ticker view.

Related Topics

Adding Markup Text to Results Using Siebel Analytics Static Text View

Use the static text view to add or edit markup text to appear with the results. You can add markup text that contains formatted text, ActiveX controls or JavaScripts, sound bites, animation, specialized logos, and so on. The markup text may contain anything that is supported by your browser.

This section provides the procedure to add or modify a static text view and some examples of static text. If you find an example that is similar to what you want to do, you can copy it and tailor it to your needs.

To add or modify a Siebel Analytics static text view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform
one of the following actions:

■ To add a new static text view, click the Results tab and choose Other Views > Static Text from
the views drop-down list.

■ To edit an existing static text view, click the Results tab, choose Compound Layout from the
views drop-down list, and then click the Edit View button for the static text view.

The workspace shows the static text view.

2 Enter the markup text into the text box.

The following table lists and describes several examples.

Static Text View Example	Description and Usage Notes
HTML text	Paste or type the HTML (or appropriate formatted text) into the text box. Based on the format of the text you are entering, markup tags may be used to control the format of the text. The following are some examples of what you can do: ■ To center text in a section: <CENTER>Centered Text</CENTER> ■ To make text bold: <B>Bold Text</B> ■ To set font size and color: <FONT SIZE="4" COLOR="red">Red Text</FONT> ■ To combine tags for additional effects: <CENTER><B><FONT COLOR="red">Bold Centered Red Text</FONT></B></CENTER>
ActiveX object	The Active-X object must be self-contained and supported by your browser. Paste or type the object into the HTML Text window, making sure to include the beginning and ending tags <object...> and </object>.
JavaScript or VBScript	The script must be self-contained and supported by your browser. Paste or type the script into the text box, making sure to include the beginning and ending tags <script> and </script>.

Static Text View Example	Description and Usage Notes
Audio	Make sure you know where the audio clip is located. If the audio clip is for use in a shared environment, it must be located on a network drive accessible to all users.
	Use the HTML tag <EMBED> to add audio, in the following format:
	<EMBED SRC=*"audio"* AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>
	where *"audio"* is the location and name of the audio clip.
	To add an audio clip located on your hard drive, the following HTML is an example:
	<EMBED SRC="c:\mycomputer\MIDIfiles\wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>
	To add the same audio clip from a shared location on your Web server, the following HTML is an example:
	<EMBED SRC="\DashboardFiles\wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>
Background image	The following example uses JavaScript.
	Make sure you know where the image to use as the background is located. If the image is for use in a shared environment, it must be located on a network drive accessible to all users.
	If the image is located in a shared dashboard files folder, the following is example HTML:
	<script language="javascript"> document.body.background = "/dashboardfiles/"*NameOfGraphic*";</script>
	where *NameOfGraphic* is the name of the file to use, such as bricks.gif or sand.jpg.

3 When you are done, you can save the request with the static text view.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Alerting Users to No Data Using Siebel Analytics No Results View

Use the no results view to specify explanatory text to appear if the request does not return any results. The text can help users understand that there was no data.

To add or modify a Siebel Analytics no results view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new no results view, click the Results tab and choose Other Views > No Results from the views drop-down list.

■ To edit an existing no results view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the no results view.

The workspace shows the no results view.

2 Type explanatory text into the Headline and Text boxes.

3 When you are done, you can save the request with the no results view.

Related Topics
"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Showing the Logical SQL for a Request Using Siebel Analytics Logical SQL View

Use the logical SQL view to show the SQL generated for the request. This view is useful for trainers and administrators, and is usually not included in results for typical users.

To add or modify a Siebel Analytics logical SQL view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new logical SQL view, click the Results tab and choose Other Views > Logical SQL from the views drop-down list.

■ To edit an existing logical SQL view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the logical SQL view.

The workspace shows the logical SQL view.

2 To issue SQL directly to the Siebel Analytics Server, click the Issue SQL button.

The Issue SQL Directly dialog box appears, with instructions to help you issue SQL.

3 When you are done, you can save the request with the logical SQL view.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Creating Segments in Siebel Marketing Using Siebel Analytics Create Segment View

The create segment view is for users of the Siebel Marketing operational application, Version 7.7, integrated with Siebel Analytics.

Use the create segment view to display a Create Segment link in the results. Users can click this link to create a segment in their Siebel Marketing operational application, based on the results data.

For more information, see the online help for the Marketing Segmentation interface.

To add or modify a Siebel Analytics create segment view

1 In Siebel Answers, create or modify the request with which you want to work, and then perform one of the following actions:

■ To add a new create segment view, click the Results tab and choose Other Views > Create Segment from the views drop-down list.

■ To edit an existing create segment view, click the Results tab, choose Compound Layout from the views drop-down list, and then click the Edit View button for the create segment view.

2 When you are done, you can save the request with the create segment view.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

Creating Lists of Contacts and Accounts Using Siebel Analytics Create Target List View

The create target list view is for users of Siebel Industry Applications, Version 7.7, integrated with Siebel Analytics. It allows automatic integration of lists of contacts and accounts into these Siebel operational applications, both network-based and disconnected, based on the results of a Siebel Analytics request. For example, users of Siebel Pharma Sales can create a target list in the operational application and use it in their Siebel Pharma Field Analytics disconnected application.

When you add a create target list view, a link named Create Target List appears in a Siebel Analytics report that appears on a user's Analytics dashboard. The user can click this link to populate or refresh a list of contacts or accounts in the Siebel operation application.

This section provides an example scenario and the procedure to add a create target list view to a Siebel Analytics request. It contains the following topics:

■ "Example Scenario for Using the Create List Target View" on page 116

■ "Adding or Modifying a Siebel Analytics Create Target List View" on page 116

Example Scenario for Using the Create List Target View

In Siebel Pharma Field Analytics, Siebel Analytics guided navigation links appear on the dashboard of a Siebel Pharma sales representative whenever certain targeted physicians have not been called upon. (A guided navigation link is used to make reports appear conditionally based upon the results returned by Siebel Answers for a particular request.)

The sales representative clicks the Guided Navigation link to view a report that contains the names of the targeted physicians. The sales representative clicks the Create Target List link, supplies a unique name for the target list, and then applies it in the Siebel Pharma operational application. The processing for the list invokes a Siebel business service that retrieves the logical SQL from the request, sends the request to the Siebel Analytics Server for execution, and enters the results into the List Management business component in the Siebel operational application. The List Management views in the disconnected application are automatically populated, so the sales representative has the most current information available for making field sales calls.

For the preceding scenario to function, the conditional report is created in an integrated environment, with both the Siebel Pharma operational application and Siebel Analytics running. The user navigates from the operational application to Siebel Answers and selects the appropriate subject area for the request. The first column the user adds to the request must be the Siebel integration ID, which is the column named ROW_ID. This column contains either the contact row identifier or the account row identifier. The user then adds other columns to the request, such as the account name and telephone number. Finally, the user adds a create target list view to the request and saves it.

Adding or Modifying a Siebel Analytics Create Target List View

This section provides the procedure to add or modify a create target list view for use in a Siebel operational application.

To add or modify a Siebel Analytics create target list view

1 In Siebel Answers, create or modify a request.

2 At the Criteria tab, locate the Siebel integration ID column in the selection pane and add it to the
request as the first column in the request.

  NOTE: The integration ID column is either the contact row identifier or the account row identifier.
  In the Siebel Pharma operational application, for example, the column is named ROW_ID. If you
  are unsure which column to select, contact your Siebel operational applications administrator.

3 Select other columns to add to the request.

4 Click the Results tab and choose Other Views > Create Target List from the views drop-down list.

  The Create Target List view is added to the request.

5 Save the request with the target list view.

  NOTE: In the next step, the name of the target list must be unique. If the name already exists,
  the Siebel operational application will return an error. If you want to use an existing name, first
  delete the like-named list from List Management in the Siebel operation application.

6 Click the link Create Target List, and supply a unique name for the target list when prompted.

  The target list is added to the Siebel operational application. The name appears as the column
  heading.

7 Apply the target list in your Siebel operational application.

Related Topics

"Overview of Siebel Answers" on page 23

"Performing Common Tasks When Working with Siebel Analytics Views" on page 76

"About Guided Navigation in Siebel Analytics" on page 147

7 Using Siebel Intelligence Dashboards

A Siebel Intelligence Dashboard is a page in an Analytics application that is used to display the results of Siebel Analytics requests and other kinds of content. Based on your permissions, you can view preconfigured dashboards, and create or modify dashboards.

This chapter describes the procedures for creating and managing the content on dashboards. It contains the following topics:

- "Overview of Siebel Intelligence Dashboards" on page 119
- "Navigating in Siebel Intelligence Dashboards" on page 121
- "Creating a New Siebel Intelligence Dashboard" on page 123
- "Adding a New Page to a Siebel Intelligence Dashboard" on page 124
- "Adding Content to a Siebel Intelligence Dashboard" on page 125
- "Changing the Properties of a Siebel Intelligence Dashboard" on page 141
- "Working with Siebel Analytics Briefing Books" on page 143
- "About Guided Navigation in Siebel Analytics" on page 147

Overview of Siebel Intelligence Dashboards

Siebel Intelligence Dashboards provide personalized views of corporate and external information. A dashboard consists of one or more pages, which appear as tabs across the top of the dashboard. Pages can display anything that you can access or open with your Web browser, such as saved Siebel Analytics requests, alerts from Siebel Delivers, images, charts, tables, text, and links to Web sites and documents.

The kinds of content that a dashboard can contain are dashboard objects, content that is saved in the Siebel Analytics Web Catalog, and views of folders in the Web Catalog. Users with appropriate permissions can add content to a dashboard by dragging and dropping it from a selection pane onto the dashboard layout page, which consists of columns to align content, and sections inside of columns to hold content. The look of a dashboard, such as background colors and the size of text, is controlled by styles and skins.

Many of the features in Siebel Intelligence Dashboards are self-explanatory, and definitions and how-to information appear on each page. When more information is available than will fit on the page, a Help button appears near the upper right corner. Click the button to see more detailed information.

Dashboard creation is reserved for users with administrative responsibilities. Permission to modify dashboards (personal and shared) is granted to a broader range of users, as determined by a Siebel Analytics administrator. Users with the appropriate permissions and responsibilities can modify a dashboard.

Table 19 provides definitions for common terms in Siebel Intelligence Dashboards.

Table 19. Definitions for Common Terms in Siebel Intelligence Dashboards

Term	Definition
Columns	Columns are used to align content on a dashboard. (Sections within columns hold the actual content.) You can create as many columns on a dashboard page as you need. Every new dashboard page automatically contains one empty column with one empty section in it. The columns used in Siebel Intelligence Dashboards are not related to the columns used in Siebel Answers.
Dashboard Objects	Dashboard objects are items that are used only in a dashboard. Examples of dashboard objects are sections to hold content, navigation links, and embedded content appearing within a frame in a dashboard.
Folders	Folders are organizational constructs that hold content saved in the Web Catalog, such as requests created with Siebel Answers. A folder is similar to a UNIX directory, or a Microsoft Windows folder.
Pages	Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page. In Siebel Intelligence Dashboards, pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content. For example, you might have one page to store results from Siebel Answers that you refer to every day, another that contains links to the Web sites of your suppliers, and one that links to your corporate intranet.
Results	Results, also called reports, are the output returned from the Siebel Analytics Server that matches the request criteria specified using Siebel Answers. The default format for viewing results in a dashboard is to show them in a table. (Results can also be shown in other formats, such as charts.) You can examine and analyze results, save or print them, or download them to a spreadsheet.
Sections	Sections appear in columns in the dashboard layout. They hold the content dragged and dropped from the selection pane, and are used to organize content within a column.
Skins	Skins control the way the Siebel Analytics Web interface appears, such as background colors, corporate logos, and the style sheets to use. Skins can be automatically assigned to users when they log on. Siebel Analytics administrators can customize the default Siebel Analytics skin and create new skins. For information about skins used in Siebel Analytics, see *Siebel Analytics Web Administration Guide*.

Table 19. Definitions for Common Terms in Siebel Intelligence Dashboards

Term	Definition
Styles	Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of charts, and so on. Styles are organized into folders that contain Cascading Style Sheets (files with a .css extension), images, and chart templates. Siebel Analytics Web administrators can customize style sheets and create new style sheets. Users can override some elements in the style sheets, such as table borders and text size, when formatting results in Siebel Answers. For information about styles used in Siebel Analytics, see *Siebel Analytics Web Administration Guide*.
Web Catalog	The Siebel Analytics Web Catalog stores content created with Siebel Answers and Siebel Intelligence Dashboards. Content is organized into folders that are either shared or personal. Types of content that can be stored in the Web Catalog include requests created with Siebel Answers, filters that are applied to results, settings for Siebel Delivers, and information about dashboards. For more information about the Web Catalog, see *Siebel Analytics Web Administration Guide*.

For information about administering permissions for dashboards, see *Siebel Analytics Web Administration Guide*. For information about default permissions and responsibilities for users of Siebel Analytics applications, see *Siebel Analytics Installation and Configuration Guide*.

NOTE: When you use a Siebel operational application, dashboard integration is done using Siebel applications. For information, see *Siebel Analytics Installation and Configuration Guide*.

Navigating in Siebel Intelligence Dashboards

This section provides procedures to view a dashboard, navigate to a dashboard page, and use keyboard shortcuts to navigate within a dashboard.

NOTE: For information about printing a dashboard, see "Printing a Siebel Analytics Dashboard or Saved Request" on page 15.

To view a dashboard

1   Log in to Siebel Analytics.

2   At the top of the page, click the name of a dashboard to display.

The dashboard appears.

To navigate to a dashboard page

1 Log in to Siebel Analytics.

2 Navigate to a dashboard.

3 At the top of the dashboard, click a dashboard page tab to display.

The dashboard page content appears. If no content has been added, an empty dashboard page notification message appears.

To use keyboard shortcuts to navigate in a dashboard

1 Log in to Siebel Analytics.

2 Navigate to a dashboard.

3 Use the keyboard shortcuts shown in Table 20 to navigate within the dashboard.

Table 20. Keyboard Shortcuts for Navigating in a Siebel Intelligence Dashboard

Keyboard Shortcut	Result
CTRL + SHIFT + V	Navigates to the first dashboard listed on the page. This is usually your personal dashboard, named My Dashboard.
CTRL + SHIFT + T	Navigates to the first page in the current dashboard.
CTRL + SHIFT +]	Navigates to the next section of content in the current dashboard. This shortcut navigates first from left to right, and then down.
CTRL + SHIFT + [	Navigates to the previous section of content in the current dashboard. This shortcut navigates first from right to left, and then up.
CTRL + SHIFT + =	Navigates to the next item within a section of content. This shortcut navigates first from left to right, and then down.
CTRL + SHIFT + -	Navigates to the previous item within a section of content. This shortcut navigates first from right to left, and then up.

Creating a New Siebel Intelligence Dashboard

The following procedure provides the steps to create a new, empty Siebel Intelligence Dashboard. Dashboard creation is reserved for users with the appropriate permissions and responsibilities.

To create a new, empty dashboard

1 Log in to Siebel Analytics and access Siebel Analytics Administration.

The Siebel Analytics Administration page appears.

2 In the Activities section, click the following link:

Manage Intelligence Dashboards

The Manage Dashboards page appears.

3 Click the following link at the bottom of the page:

Create a new Intelligence Dashboard

4 At the Create Dashboard page, enter a location and name for the dashboard, and the name of the user or group that can modify the dashboard.

5 Exit Siebel Analytics and return to Siebel Intelligence Dashboards.

The name of the new dashboard appears at the top of the screen.

NOTE: Newly-created dashboards contain one blank page. Dashboards that contain only one page do not display the page name as a tab at the top of the dashboard. Dashboard page names appear at the top of a dashboard only when the dashboard contains multiple pages.

6 Click the name of the new dashboard.

An empty dashboard page appears.

7 To add content to the dashboard, click either of the following links:

■ Click here to add content

■ Edit Dashboard

The Dashboard Editor appears.

Adding a New Page to a Siebel Intelligence Dashboard

The following procedure provides the steps to add a new page to a Siebel Intelligence Dashboard.

NOTE: Dashboard modification is reserved for users with the appropriate permissions and responsibilities.

To add a new page to a dashboard

1 Log in to Siebel Analytics and navigate to Siebel Intelligence Dashboards.

2 At the top of the page, click the name of a dashboard to which you want to add a new page.

The dashboard appears.

3 Click the Edit Dashboard link.

The Dashboard Editor appears.

4 Click the Add Dashboard Page button near the top of the Dashboard Editor:

The Add Dashboard Page screen appears.

5 Type a name and a description for the dashboard page.

6 Click the Finished button.

The new page appears on the dashboard.

NOTE: Note: If there is only one page in the dashboard, the page name will not appear on a tab. Tabs appear only when there is more than one page, so you can click the tabs to move between the pages.

Adding Content to a Siebel Intelligence Dashboard

Use the Dashboard Editor to lay out and add content to a Siebel Intelligence Dashboard. This section provides the procedure to access the Dashboard Editor and explains how to work with the Dashboard Editor. It contains the following topics:

■ "Working with Siebel Intelligence Dashboard Pages and Layout Using the Dashboard Editor" on page 126

■ "Adding and Displaying Content in a Siebel Intelligence Dashboard Page Using the Dashboard Editor" on page 128

■ "Renaming and Deleting Objects on a Siebel Intelligence Dashboard Page Using the Dashboard Editor" on page 139

■ "Modifying Siebel Intelligence Dashboard Properties Using the Dashboard Editor" on page 140

To access the Siebel Intelligence Dashboard Editor

1 Log in to Siebel Analytics and navigate to Siebel Intelligence Dashboards.

2 At the top of the page, click the name of a dashboard you want to edit.

The dashboard appears.

3 Click the Edit Dashboard link.

The Dashboard Editor appears.

Related Topics

"Creating a New Siebel Intelligence Dashboard" on page 123

"Adding a New Page to a Siebel Intelligence Dashboard" on page 124

"Navigating in Siebel Intelligence Dashboards" on page 121

Working with Siebel Intelligence Dashboard Pages and Layout Using the Dashboard Editor

This section explains how to control the appearance of dashboard pages. It contains the following topics:

■ "Selecting a Siebel Intelligence Dashboard Page to Edit" on page 126

■ "Working with Columns in a Siebel Intelligence Dashboard Page" on page 126

■ "Adding a Section to a Siebel Intelligence Dashboard Page" on page 127

■ "Making a Section Appear Horizontally in a Siebel Intelligence Dashboard Page" on page 127

■ "Saving Changes to a Siebel Intelligence Dashboard Page" on page 128

NOTE: If iBots are enabled within Siebel Delivers, an Alerts section will be added to the first page of My Dashboard if one is not manually placed there. For information about iBots, see "Overview of Siebel Delivers" on page 149.

Selecting a Siebel Intelligence Dashboard Page to Edit

The following procedure explains how to select the page with which you want to work.

To select the dashboard page

■ From the Page drop-down list next to the name of the dashboard, select the page you want to edit.

  NOTE: This action saves any changes you made to the page you were working with.

Working with Columns in a Siebel Intelligence Dashboard Page

Columns are used to align content on a dashboard. (Sections within columns hold the actual content.) You can add or remove columns, set the width in pixels or as a percentage of the dashboard page, and break columns.

When you have more than one column on a dashboard page, you can break columns to arrange them on the page. (Drag and drop does not reposition columns.) For example, if you have two columns side by side, breaking the rightmost column causes it to move beneath the first column, and both columns will span the width originally occupied when they were side by side. If you have three columns side by side, breaking the middle column causes the two outer columns to move beneath the first column, and the first column spans the width originally occupied by the first two columns.

To add a new column

■ Click the Add Column button near the top of the Dashboard Editor:

The column is added to the dashboard page.

To set the width of a column

1 Click the Properties button and choose Set Width.

The Column Properties dialog box appears.

2 Specify the column width:

■ To specify the width in pixels, type the number of pixels, for example, 200.

■ To specify the width as a percentage of the dashboard page, use the percent (%) sign, for example, 20%.

3 Click OK.

To break a column

■ Click the Properties button and choose Insert Column Break.

If you break the column again, the column layout reverts to what it was previously.

Adding a Section to a Siebel Intelligence Dashboard Page

Sections are used within columns to hold the content of a dashboard. Sections are aligned vertically by default. You can drag as many sections as you need into a column.

If you drag and drop content into a column without first adding a section to hold the content, a section is created automatically.

If you drag a section from one column into another column, any content in that section is also included.

NOTE: If Siebel Delivers is enabled, a section for Alerts is added automatically to the first page of users' personal dashboards (My Dashboard) if a section is not placed there manually.

To add a section to a column

■ From the selection pane, drag and drop a Section object from the Dashboard Objects area into the column.

The column is highlighted when you are at an appropriate location in the column to drop the section.

Making a Section Appear Horizontally in a Siebel Intelligence Dashboard Page

The default alignment for sections is to align them vertically.

To make a section appear horizontally

■ Click the Properties button for the section and choose Horizontal Alignment.

Saving Changes to a Siebel Intelligence Dashboard Page

You can save your changes at any time.

To save changes to a dashboard page

■ Perform one of the following actions:

■ Click the Save button.

■ Leave the page you are working on in the Dashboard Editor.

For example, your changes are saved if you add or edit another page, change dashboard properties, or modify a prompt, filter, or request.

Adding and Displaying Content in a Siebel Intelligence Dashboard Page Using the Dashboard Editor

This section explains how to add and display content on dashboard pages, such as using guided navigation to make content appear conditionally. It contains the following topics:

■ "Making Content Appear Conditionally in a Siebel Intelligence Dashboard Page" on page 128

■ "Adding a Guided Navigation Link to a Siebel Intelligence Dashboard Page" on page 129

■ "Adding a Briefing Book Navigation Link to a Siebel Intelligence Dashboard Page" on page 129

■ "Adding a Text Link or an Image Link to a Siebel Intelligence Dashboard Page" on page 130

■ "Adding Embedded Content to a Siebel Intelligence Dashboard Page" on page 133

■ "Adding HTML to a Siebel Intelligence Dashboard Page" on page 134

■ "Adding a View of a Web Catalog Folder to a Siebel Intelligence Dashboard Page" on page 136

■ "Adding Content Saved in the Web Catalog to a Siebel Intelligence Dashboard Page" on page 137

■ "Controlling How Results Display When a User Drills on a Siebel Intelligence Dashboard" on page 137

■ "Editing the Properties of Siebel Intelligence Dashboard Prompts and Reports" on page 138

Making Content Appear Conditionally in a Siebel Intelligence Dashboard Page

You can make an entire section of a dashboard and its content appear conditionally based upon the results returned by Siebel Answers for a particular request.

For more information, see "About Guided Navigation in Siebel Analytics" on page 147.

To make content appear conditionally

1 Click the Properties button for the section that contains the content and choose Guided Navigation.

The Guided Navigation Properties dialog box appears.

2 Specify your choices, browse to select the request from the Web Catalog, and click OK.

Adding a Guided Navigation Link to a Siebel Intelligence Dashboard Page

Guided navigation links can be static or conditional. Static links always appear. Conditional links appear only if results meet certain criteria.

For more information, see "About Guided Navigation in Siebel Analytics" on page 147.

To add a guided navigation link

1 From the selection pane, drag and drop a Guided Navigation Link object into a section in the dashboard page.

2 Click the Properties button for the link.

The Guided Navigation Link Properties dialog box appears.

3 Choose the type of link to add:

■ To make the link conditional, specify your choices in the Conditional Link Properties area.

■ To make the link static, specify your choices in the Guided Navigation Properties area.

NOTE: For URLs, provide the full path.

4 Click OK.

Adding a Briefing Book Navigation Link to a Siebel Intelligence Dashboard Page

Briefing Book navigation links are for use with briefing books in Disconnected Analytics. For dashboard pages that will be saved in briefing books, use this to include navigation links to other requests or dashboard content for use in offline analysis. Briefing Book navigation links also function on non-Briefing Book dashboards.

For more information about briefing books, see "Working with Siebel Analytics Briefing Books" on page 143.

To add a Briefing Book navigation link

1 From the selection pane, drag and drop a Briefing Book Navigation Link object into a section in the dashboard page.

2 Click the Properties button for the link.

The Briefing Book Link Properties dialog box appears.

3 Specify your choices and click OK.

Adding a Text Link or an Image Link to a Siebel Intelligence Dashboard Page

You can add text links and image links to a dashboard and specify what should happen when a user clicks them. For example, you can direct users to another Web site or dashboard, open documents, launch applications, or perform any other action that your browser supports. You can also add an image or text only, without any links.

To add a text link or image

1 From the selection pane, drag and drop a Link or Image object onto a section in the dashboard page.

2 Click the Properties button for the object.

The Link or Image Properties dialog box appears.

3 Specify your choices:

■ For a text link, type the text into the Caption field.

■ For an image link, type the location and name of the image into the Image field.

Specify the location as a URL. These are examples:

`http://imageserver/MyImage.gif`

`/DashboardFiles/image.gif`

If the image is not on the local server, the URL must include http://. If the image is for use in a shared environment, it must be located on a network drive accessible to all users.

If you want a caption for the image, type a caption for the image in the Caption field, and use the Layout drop-down list to choose where the caption should appear relative to the image.

4 Specify what should happen when the user clicks the text or image:

■ To specify that a request or dashboard should appear when the user clicks the link or image, specify the destination as Request or Dashboard, and click the Browse button to select the request or dashboard.

■ To specify that another action should occur, such as opening a Web site, document, or program, specify the destination as a URL and type the full path into the field that follows the Destination options.

A link is defined as any URL (Uniform Resource Locator) that your browser can interpret. URLs can point to Web sites, documents, images, FTP sites, newsgroups, and so on. Depending on your browser, the following are examples of valid URLs:

`http://home.netscape.com/index.html`

`ftp://ftp.microsoft.com`

```
news:news.announce.newusers
```

See Table 21 on page 132 for more information about the kinds of internal or external content to which you can link.

NOTE: Siebel Analytics Web administrators should create a virtual directory on the Web server for shared documents called \DashboardFiles that maps to a shared network directory of the same name. This allows users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, \DashboardFiles\AnnualReport.doc instead of \\SharedServer\CommonShare\DashboardFiles\AnnualReport.doc.

■ In the Target area, choose whether the destination should appear in the user's existing browser window or in a new window.

TIP: For every action except sending mail and executing a program, you can control how the link should appear. Choose the current window when you want the action to occur in the display pane of the dashboard. This leaves the dashboard active but in the background. Choose a new window when you want the action to take place in a new browser window. This opens another instance of your browser.

NOTE: To add text or an image only, without any links, leave the field that follows the Destination options blank.

5 Click OK.

Table 21. Link Options for Adding a Text Link or Image Using the Dashboard Editor

Link Option	Comments
Web site or document	You need to locate the URL, or address, for the site or document. You can copy the destination address from your browser's address or location box, and then paste it.
	For a Web site, you can omit the http:// portion of the address if the URL resides on your Web server, such as your intranet site.
	If the URL resides on your organization's Web server, you can enter the relative address of the file. For example:
	\DashboardFiles\Logo.gif
Local or shared document	If the document is for use in a shared environment, it must be located on a network drive accessible to all users. Examples of the kinds of documents you can open are spreadsheets containing recent sales reports, a slide presentation introducing a new product, a Microsoft Word document containing your company's annual report, a graphic file that contains a map from the airport to your corporate headquarters, and so on.
	For example, if the document is for your use only, a sample location might be:
	c:\mycomputer\reports\report.doc
	For a shared document, specify the UNC name, for example:
	\\ALLUSERS\reports\report.doc
Send email to a specified user	You need to know the mailto URL, for example:
	mailto:support@siebel.com
	When the user selects this link, the browser will launch the mail application with the To: field filled in. (The browser controls the launching of the mail program.)

Table 21. Link Options for Adding a Text Link or Image Using the Dashboard Editor

Link Option	Comments
Execute a program	If the program is for use in a shared environment, it must be located on a network drive accessible to all users. You can use this feature to download and run an application. (The operating system controls the launching of the application.) For example, if you wanted to launch Microsoft Word for your use only, a sample location might be: c:\MSOFFICE\OFFICE\winword.exe For a multiuser-licensed program on a shared drive, specify the UNC name for the location, for example: \\ALLUSERS\SOFTWARE\MSOFFICE\OFFICE\WORD\winword.exe
Refresh your browser using JavaScript	Your browser needs to support JavaScript in order to use this example.: javascript:window.location.reload() In the Target area, choose the option Current Window.

Adding Embedded Content to a Siebel Intelligence Dashboard Page

Embedded content is any content that appears within a window (called a frame) inside the dashboard, as opposed to content that is accessed by clicking a link. Content that you might want to embed includes reports, Excel charts, documents, Web sites, tickers from Web sites, and so on. Reports are embedded by default.

When you embed content into a dashboard, Siebel Analytics automatically adds the required HTML to the target content. The default size of the window is 600 pixels by 440 pixels. You can change the size of the window to make it bigger or smaller.

Scroll bars are automatically added to the window if they are needed. You can suppress scroll bars.

NOTE: Some third-party Web sites, because of the way they have been created, cannot be embedded within another Web page. If you see unexpected results when viewing an embedded Web site, you may need to click your browser's Back button until a Siebel Analytics screen reappears, or close and then reopen your browser. Then, remove the embedded Web site from the dashboard.

To add embedded content

1   From the selection pane, drag and drop an Embedded Content object onto a section in the dashboard page.

2   Click the Properties button for the object.

The Embedded Content Properties dialog box appears.

3 In the URL box, type the location and name of the content to embed.

These are examples:

`http://www.siebel.com`

`/dashboardfiles/piechart.xls`

NOTE: The URL that you specify should begin with http:// unless you plan to use an item that is saved on your Web server. If you use a network path to indicate the location of the item, make sure you use the exact path. Items that are embedded on a shared dashboard must be located on a network drive accessible to all users.

4 If you want to change the size of the default window, type new values into the Width and Height boxes.

NOTE: The default size of the embedded content area is 600 by 440 pixels. The dimensions that you specify for the content area will apply even if the content does not fill the area. For example, if you embed an image and indicate a width of 100 and a height of 100, but the image only has a width of 50 and a height of 50, the dashboard designates an area with the dimensions you specified (100 by 100). Items that you place in the content area are not stretched or reduced to fit the area.

5 If you do not want the window to have scroll bars, click the following option:

Hide Scroll Bars

6 Click OK.

Adding HTML to a Siebel Intelligence Dashboard Page

You can add HTML that contains formatted text, Active-X controls or Java scripts, sound bites, animation, a background image, and so on. The name you assign in the Dashboard Editor is the name that will be used for the HTML object in the Web Catalog. The HTML may contain anything that is supported by your browser.

Table 22 on page 135 contains usage notes and examples for several HTML elements. If you find an example in the table that is similar to what you want to do, you can copy and paste the example, and then tailor it to your needs.

If you want to add embedded content, which is content that appears in a window within the browser, choose the Embedded Content object in the Dashboard Editor instead. Then, using the Embedded Content feature, specify the name and location of the target, and Siebel Analytics Web will wrap the required HTML around the target for you.

To add HTML to a dashboard page

1 From the selection pane, drag and drop an HTML object onto a section in the dashboard page.

2 Click the Properties button for the object.

The HTML Properties dialog box appears.

3 Enter the HTML.

4 To preview the results, click Preview.

If you make any changes, you can click Preview again to see the results.

5 Click OK.

Table 22. Usage Notes and Examples for HTML Elements in a Siebel Intelligence Dashboard

HTML Element	Usage Notes and Examples

Text	Any HTML tags may be used to control the format of the text. The following HTML tags are examples of some of the formatting you can apply.
	
	■ To center the text in the section:
	
	`<CENTER>Centered Text</CENTER>`
	
	■ To make the text bold:
	
	`<B>Bold Text</B>`
	
	■ To set font size and color:
	
	`<FONT SIZE="4" COLOR="red">Red Text</FONT>`
	
	■ You can also combine tags for additional effects:
	
	`<CENTER><B><FONT COLOR="red">Bold Centered Red Text</FONT></B></CENTER>`

Active-X object	The Active-X object must be self contained and supported by your browser. Paste or type the object into the HTML text window, making sure to include the beginning and ending tags <object...> and </object>.

Table 22. Usage Notes and Examples for HTML Elements in a Siebel Intelligence Dashboard

HTML Element	Usage Notes and Examples
JavaScript and VBScript	The script must be self contained and supported by your browser. Paste or type the script into the HTML text window, making sure to include the beginning and ending tags <script> and </script>. Specify the script language in the opening <SCRIPT> tag, either <SCRIPT LANGUAGE="javascript"> or <SCRIPT LANGUAGE="vbscript">.

Audio	Make sure you know where the audio clip is located. If the audio clip is for use in a shared environment, it must be located on a network drive accessible to all users. Use the HTML tag <EMBED> to add audio in your dashboard. The following HTML is an example:
	
	`<EMBED SRC="audio" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`
	
	where "audio" is the location and name of the audio clip.
	
	NOTE: You may need to adjust the HTML for your browser.
	
	The following HTML tags are examples of the <EMBED> tag.
	
	■ To add an audio clip located on your hard drive, you could specify the following HTML:
	
	`<EMBED SRC="c:\mycomputer\MIDIfiles\wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`
	
	■ To add the same audio clip from a shared location on your Web server, you could specify the following HTML:
	
	`<EMBED SRC="/DashboardFiles/wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`

Adding a View of a Web Catalog Folder to a Siebel Intelligence Dashboard Page

You can add a view of a Web Catalog folder and its contents, such as saved requests, to a dashboard. For example, if you have a collection of saved requests that you run frequently, you can open the folder in the dashboard, navigate to a saved request, and click it to run it.

To add a view of a folder

1 From the selection pane, drag and drop a Folder object onto a section in the dashboard page.

2 Click the Properties button for the folder.

The Folder Properties dialog box appears.

3 Browse to select the folder and click OK.

Adding Content Saved in the Web Catalog to a Siebel Intelligence Dashboard Page

You can add content that you or someone else has already saved in a shared folder or dashboard, such as dashboard prompts and reports. To locate the content, you can browse by either the Web Catalog folder it is stored in, or by the dashboard it appears on.

To add saved content

1   From the selection pane, in the Saved Content area, navigate to the folder or dashboard that contains the content you want to add to the dashboard.

2   Locate the content that you want to add, and drag and drop it into a section in the dashboard page.

This adds a shortcut to the content as saved in the Web Catalog. If the content changes, the change will be reflected on the dashboard page.

For information about editing the properties of dashboard and reports, see "Editing the Properties of Siebel Intelligence Dashboard Prompts and Reports" on page 138.

Controlling How Results Display When a User Drills on a Siebel Intelligence Dashboard

When a user drills on a report, you can show the new results in one of the following ways:

■   Show the new results directly in the dashboard, replacing the original report. This is the default. The area occupied by the original report resizes automatically to hold the new results.

■   Replace the entire dashboard with the new results.

This is controlled by the Drill in Place option. This option is set at the section level, which means that it applies to all drillable reports within the section. The user can click the browser's Back button to return to the original report or the dashboard.

To control how results display when a user drills

■   Click the Properties button for the section and make your selection for the Drill in Place option:

   ■   To show the new results directly in the dashboard, click Drill in Place to select it. A check mark appears next to this option when it is selected. This is the default.

   ■   To replace the dashboard with the new results, click Drill in Place to remove the check mark.

Editing the Properties of Siebel Intelligence Dashboard Prompts and Reports

You can edit the properties of dashboard prompts and reports added to a dashboard from the Web Catalog. This action saves any changes you made to the page you were working with.

To edit the properties of a dashboard prompt

1 Click the Properties button for the dashboard prompt and click Modify.

The Dashboard Prompt page appears.

2 Make your changes to the dashboard prompt.

For more information, click the Help button on the Dashboard Prompt page.

3 Click Save to save the dashboard prompt.

To edit the properties of a report

1 Click the Properties button for the report.

2 Select one of the following options:

■ Embed in section

This option executes the request automatically and displays the results directly in the dashboard, rather than displaying a link that users must click to execute the request and see the results. This option is selected by default for reports.

For more information about embedded content, see "Adding Embedded Content to a Siebel Intelligence Dashboard Page" on page 133.

■ Show View

This option shows the available views of the report constructed in Siebel Answers. You can select the view you want to see.

■ Links

This option opens the Report Links dialog box, where you can select the links that you want to appear with the report on the dashboard page.

■ Modify

This option displays the Criteria tab in Siebel Answers, where you can modify the request that generates the report.

Renaming and Deleting Objects on a Siebel Intelligence Dashboard Page Using the Dashboard Editor

This section explains how to rename and delete objects in a Siebel Intelligence Dashboard. It contains the following topics:

Renaming Objects on a Siebel Intelligence Dashboard Page

Objects on a dashboard that do not already have a name are assigned a default name, such as Section 1, Link 1, and so on. You can rename objects to assign meaningful, descriptive names.

To rename an object

1 In the Dashboard Editor, click the Rename button for the object.

The Rename dialog box appears.

2 Type a new name for the object and click OK.

Deleting Objects on a Siebel Intelligence Dashboard Page

If you add an object that you decide you do not want, you can delete it.

For objects saved in the Web Catalog, the object is deleted from the dashboard page only. It is not deleted from the Siebel Analytics Web Catalog. (Users with the appropriate permissions can edit the contents of the Web Catalog by clicking the Manage button on the Catalog tab in the selection pane in Siebel Answers.)

To delete an object on a dashboard page

■ In the Dashboard Editor, click the Delete button for the object.

NOTE: When you delete a column, other columns on the page may resize automatically to maintain column alignment.

Modifying Siebel Intelligence Dashboard Properties Using the Dashboard Editor

This section explains how to change the properties and printing options of the Siebel Intelligence Dashboard. It contains the following topics:

-
-

Changing Siebel Intelligence Dashboard Properties

You can set properties for the entire dashboard, such as the style to use, and delete, reorder, and hide pages. Changing dashboard properties automatically saves any changes you made to the page you were working with.

To change dashboard properties

1 Click the Dashboard Properties button near the top of the Dashboard Editor:

The Dashboard Properties page appears.

Specify your choices. For information, click the Help button, or see "Changing the Properties of a Siebel Intelligence Dashboard" on page 141.

2 When you are done, click the Finished button to return to the Dashboard Editor.

Changing PDF and Printing Options on a Siebel Intelligence Dashboard Page

When printing a dashboard, you can specify page settings and header content for the output. Dashboards are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

To change PDF and print options

1 Click the PDF and Print Control Properties button near the top of the Dashboard Editor:

The PDF and Print Control dialog box appears.

2 Specify your choices and click OK.

Changing the Properties of a Siebel Intelligence Dashboard

This section explains how to use the Dashboard Properties page to display or modify the properties for a dashboard. It contains the following topics:

■ "Accessing the Dashboard Properties Page for a Siebel Intelligence Dashboard" on page 141

■ "Selecting a Style for a Siebel Intelligence Dashboard" on page 141

■ "Adding a Description for a Siebel Intelligence Dashboard" on page 142

■ "Renaming, Deleting, Reordering, and Hiding a Siebel Intelligence Dashboard Page" on page 142

NOTE: Dashboard modification is reserved for users with the appropriate permissions and responsibilities.

Accessing the Dashboard Properties Page for a Siebel Intelligence Dashboard

This section explains how to navigate to the Dashboard Properties page.

To access the Dashboard Properties page for a dashboard

1 Log in to Siebel Analytics and navigate to Siebel Intelligence Dashboards.

2 At the top of the page, click the name of a dashboard whose properties you want to change.

The dashboard appears.

3 Click the Edit Dashboard link.

The Dashboard Editor appears.

4 Click the Dashboard Properties button near the top of the Dashboard Editor:

The Dashboard Properties page appears.

Selecting a Style for a Siebel Intelligence Dashboard

Styles control how dashboards and results are formatted for display. Your Siebel Analytics administrator may have created styles that you can choose from. If not, results are formatted using a default style.

For more information about styles, see *Siebel Analytics Web Administration Guide*.

To select a style for a dashboard

■ In the General Properties area at the Dashboard Properties page, select the style to use from the Style drop-down list.

Adding a Description for a Siebel Intelligence Dashboard

Descriptions are displayed when Siebel Analytics administrators use the Catalog Manager. The description will not appear on the dashboard.

To add a description for a dashboard
■ Type a description for the dashboard into the Description box at the Dashboard Properties page.

Renaming, Deleting, Reordering, and Hiding a Siebel Intelligence Dashboard Page

This section provides procedures to rename, delete, reorder, and hide dashboard pages. The Dashboard Pages area of the Dashboard Properties page shows you the pages for the dashboard. The pages are listed in the same order as their tabs.

When you rename a dashboard, you can preserve users' references to the dashboard that use the previous name. This creates a shortcut with the old name that points to the renamed dashboard in the Web Catalog.

If you are working with a dashboard page, you can hide it from users until your changes are complete.

CAUTION: The actions described in the following procedures will not be undone by clicking Cancel.

To rename a dashboard page
■ Click the Rename button at the Dashboard Properties page to open the Rename Item page, and follow the instructions given there.

To delete a dashboard page
■ Click the Delete button at the Dashboard Properties page, and confirm the delete when prompted.

To change permissions for the contents of a dashboard page
■ Click the Security button at the Dashboard Properties page to open the Change Item Permissions page, and follow the instructions given there.

   NOTE: The Security button appears for shared dashboards only, and only if your user ID is authorized to access the security features.

To reorder a dashboard page
■ To move a dashboard page up in the list, click the Move Up button at the Dashboard Properties page.

   On the dashboard, this moves the tab for the page to the left.

■ To move a page down in the list, click the Move Down button at the Dashboard Properties page.

On the dashboard page, this moves the tab for the page to the right.

To hide a dashboard page
■ Click the Hidden option for the page at the Dashboard Properties page.

The page remains visible to any users currently viewing it.

Working with Siebel Analytics Briefing Books

If your organization licensed Siebel Analytics Briefing Books, you can store a static snapshot of dashboard pages or individual requests in one or more briefing books. You can then download and share briefing books for viewing offline. Briefing books and their content can also be updated, scheduled, and delivered using Siebel Delivers.

The following topics explain how to work with briefing books.

■ "Creating a Siebel Analytics Briefing Book" on page 143

■ "Adding Content to a Siebel Analytics Briefing Book" on page 144

■ "Editing and Downloading a Siebel Analytics Briefing Book" on page 145

■ "Using Siebel Delivers to Update a Siebel Analytics Briefing Book" on page 146

■ "Viewing a Siebel Analytics Briefing Book" on page 146

Creating a Siebel Analytics Briefing Book
The following procedure explains how to create a briefing book.

To create a Siebel Analytics Briefing Book
1 Navigate to Siebel Intelligence Dashboards and then perform one of the following actions:

■ Click the Add to Briefing Book button, located near the bottom of the dashboard page.

■ Click the Add to Briefing Book link that appears with an individual request on the dashboard.

The Save Briefing Book Content page appears.

2 Click the following button:

Create New Briefing Book

The Create New Briefing Book page appears.

3   Type a name and a description for the briefing book, and then save the briefing book.

The briefing book appears in the Current Briefing Books list at the Save Briefing Book Content page.

4   Click the Cancel button to return to Siebel Intelligence Dashboards.

This creates an empty briefing book. The briefing book folder appears in the selection pane in Siebel Answers and Siebel Delivers.

5   To add additional briefing books, click the Add to Briefing Book link or button, and then create them using the preceding steps.

Adding Content to a Siebel Analytics Briefing Book

Use the following procedure to add the content of a dashboard page or an individual request to a briefing book.

To add content to a Siebel Analytics Briefing Book

1   Navigate to Siebel Intelligence Dashboards and then perform one of the following actions:

■   To add the contents of a dashboard page to a briefing book, navigate to the dashboard and click the Add to Briefing Book button:

■   To add the results of an individual request to a briefing book, locate the request on the dashboard and click the following link:

Add to Briefing Book

NOTE: This link appears only if the request was added to the dashboard with the option to show the link Add to Briefing Book.

The Save Briefing Book Content page appears.

2   Choose the briefing book from the Current Briefing Books drop-down list.

3   Make your selections for the Save Options area.

a   For Content Type, choose one of the following options:

❏   **Snapshot.** This adds the content in its current state. Snapshot content preserves the original data and is not updated when the briefing book is rerun. Snapshot content will not be updated using Siebel Delivers.

❏   **Updatable.** The content is refreshed whenever the briefing book is downloaded, or when it is specified as the delivery content for an iBot in Siebel Delivers.

b   For Follow Briefing Book Navigation Links, choose one of the following options:

❏   **No.** Briefing book navigation links will not be followed.

❏   **Yes.** Briefing book navigation links will be followed.

c If you specified Yes for Briefing Book Navigation Links, choose the number of links to follow in the briefing book.

The default value for the maximum number of links to follow is 5.

NOTE: A briefing book navigation link is a special type of link that can be added to a dashboard using the Dashboard Editor. When a briefing book navigation link is found in content included in a briefing book, the destination content for that link is also included in the briefing book. For more information, see "Adding a Briefing Book Navigation Link to a Siebel Intelligence Dashboard Page" on page 129.

Editing and Downloading a Siebel Analytics Briefing Book

A saved briefing book is shown in the selection pane in Siebel Answers and Siebel Delivers. On the Catalog tab, the briefing book is shown in the My Briefing Books list. In the Web Catalog, briefing books are saved in the _Briefbook folder.

You can reorder and delete briefing book content, change the properties for the content type and briefing book navigation links, and download the briefing book to your computer. You can also add a list of your briefing books to your dashboard page.

To edit or download a Siebel Analytics Briefing Book

1 Access your corporate network and log in to Siebel Analytics.

2 Navigate to the briefing book in the selection pane in Siebel Answers, and then click it.

The right pane displays the contents of the briefing book.

3 To reorder content, click the Move Up and Move Down arrows.

4 To delete content, click the Delete button.

5 To change the content type, navigation link properties, or the description, click the Properties button.

The Page Properties dialog box appears.

6 Make any desired changes for the content type, briefing book navigation links, and the description, and then click OK.

7 To download the briefing book, click the Get Now button and specify the location in which to save it.

Downloaded briefing books are saved with an .ssb file extension. You can then email or share the briefing book.

NOTE: The Briefing Book Reader application is required to view a downloaded briefing book. For more information, see "Viewing a Siebel Analytics Briefing Book" on page 146.

8 When you are done, click the Finished button to save any properties you changed.

To add a list of your briefing books to your dashboard page

1 Navigate to Siebel Intelligence Dashboards and click the Edit Dashboard link.

The Dashboard Editor page appears.

2 From the Dashboard Objects list, drag and drop a folder object into a section.

3 Click the Properties button for the folder.

The Folder Properties dialog box opens.

4 Browse to locate the folder labeled My Folder, click the folder _Briefbook, and then click OK to return to the Folder Properties dialog box.

5 Click OK, and then click the Save button.

A folder labeled My Briefing Books is added to your dashboard:

■ To see a list of your briefing books, click the folder.

■ To edit the properties of a briefing book, click its link.

Using Siebel Delivers to Update a Siebel Analytics Briefing Book

If your organization licensed Siebel Delivers, you can use Siebel Delivers to specify a briefing book as the delivery content for an iBot.

To use Siebel Delivers to update briefing book content

1 Navigate to Siebel Delivers, and create or modify an appropriate iBot.

2 At the Delivery Content tab, click the Select Content button and navigate to the briefing book to which you want content delivered.

When the iBot runs, the updatable content in the briefing book is refreshed.

Viewing a Siebel Analytics Briefing Book

Use the Siebel Analytics Briefing Book Reader application to view downloaded briefing books. Consult your Siebel Analytics administrator if you need the Briefing Book Reader application.

To view a Siebel Analytics Briefing Book

1 Click the briefing book to open it.

NOTE: Briefing books have an .sbb file extension.

This launches the Briefing Book Reader application. The briefing book opens in the browser.

2 Use the arrows or the menu options to navigate the content.

If briefing book navigation links were included, you can also click them to navigate.

About Guided Navigation in Siebel Analytics

Guided navigation can aid users' insight into business issues and appropriate actions to take by guiding their exploration of results obtained from Siebel Answers. When based on common scenarios and best practices for your industry or organization, guided navigation allows users to see and analyze related issues by navigating to a related set of results, another dashboard, or a URL. Guided navigation is specified using the Dashboard Editor.

There are three types of guided navigation:

- **Guided navigation using static links.** When specified for a request, the results on the dashboard always include a link to another request, a dashboard, or URL. For example, a report that shows customer satisfaction gap trends can always appear with a link to a report that shows customer satisfaction by product line.

- **Guided navigation using conditional links.** When specified for a request, a link to another request, dashboard, or URL appears only if the results meet certain criteria. For example, if the number of open critical service requests exceeds a certain threshold, the result set can include a link to a report that shows customer satisfaction by employee.

- **Guided navigation using conditional sections.** Entire dashboard sections can appear based upon the results returned by Siebel Answers for a particular request. For example, if the results show that sales are down by 15 percent or greater in the past week, a dashboard section that contains links to related reports and tools can appear.

The display of static links does not generally affect dashboard rendering time. The display of numerous conditional links or sections can affect dashboard rendering time.

For information about the Dashboard Editor, see "Adding Content to a Siebel Intelligence Dashboard" on page 125.

8 Using Siebel Delivers

This chapter provides information about using Siebel Delivers. It contains the following topics:

Overview of Siebel Delivers

Siebel Delivers is the interface used to create alerts based on analytics results. If your organization licensed this interface, you can use Siebel Delivers to detect specific results and immediately notify the appropriate person or group through Web, wireless, mobile, and voice communications channels.

This section describes Siebel Delivers, provides information about how it works, and explains how to control access to Siebel Delivers. It contains the following topics:

About Siebel Delivers

Siebel Delivers allows you to create your own unique form of information insurance, where any information-based problem or opportunity can be detected, and the appropriate person immediately notified through the Web or by wireless, mobile, and voice devices. Siebel Delivers uses intelligence agents or Bots, called iBots. iBots are software-based agents driven by schedule or events that can access, filter, and perform analytics on data based upon defined criteria. iBots provide proactive delivery of real-time, personalized and actionable intelligence throughout the business network.

iBots provide intelligence from data spanning operational and analytical sources. The result is information that is timely, complete and in context. Upon detection of a problem or opportunity, iBots can determine the appropriate individuals to notify and deliver information to them through a wide range of devices (such as email, pager, PDA, RIM and US and European mobile phones, and so on). Content and capabilities are automatically optimized for each recipient's device. iBots can also pass information and context to other iBots and applications, allowing automation of multistep, multiperson analytic processes.

Table 23 provides definitions for common terms in Siebel Delivers.

Table 23. Definitions of Common Terms in Siebel Delivers

Term	Definition
Alert	An alert is the personalized and actionable content delivered as a result of iBot activities.
Delivery Profile	Your delivery profile specifies which devices to use to deliver content to you, based on the priority of the content. You can define several delivery profiles to meet your needs, and switch among them. Siebel Delivers uses your active delivery profile to determine which devices should receive delivered content.
Device	A device is the medium used to deliver content to you. The content of an iBot can be delivered on a variety of devices, including plain text or HTML email, mobile phone, pager, and PDA.
iBot	An iBot is a software-based intelligent agent used to access, filter and perform analytics on data. iBots may be event-based or scheduled. They provide constant monitoring and intelligence that spans operational and analytic sources. iBots dynamically detect problems and opportunities, determine who to notify, and how to deliver the content.

How Siebel Delivers Works

In the simplest format, a Siebel Delivers iBot automatically performs a specified Web Catalog request (created with Siebel Answers) based on a defined schedule, and examines the results for a specific problem or opportunity. If the specific problem or opportunity is detected in the results, an alert is generated and passed to people who are subscribed to the iBot, using the delivery options specified for each person.

The content of the iBot is tailored for each associated delivery device. For example, content sent to a pager might include only a telephone number, and content sent to a Blackberry device might include an email with more detailed information such as a chart.

You may be automatically subscribed to some iBots, and iBots created by others may be available for you to subscribe to. You can also create your own iBots if you have the appropriate permissions and responsibilities. Depending on the level of authority you have, you can selectively share iBots with others or make iBots available for all users.

You can specify your account information and preferences using the My Account link (available from Siebel Answers, from Siebel Delivers, and from Siebel Intelligence Dashboards). The Delivery Options section shows the devices and delivery profiles configured for use by Siebel Delivers. Siebel Delivers uses your active delivery profile to determine which devices should receive delivered content. You might have an In the Office delivery profile that delivers content to a Web browser and office email, and an On the Road profile that delivers content to your pager or PDA, depending on the priority of the information. You can access the My Account link to switch between available profiles as needed.

To handle more complex requirements, iBots can trigger other iBots, scripts or applications. Results can be passed between iBots, and to other applications or services through XML, HTML, or plain text. For example, an iBot may run a request to identify all current product orders over a specified dollar amount that cannot be filled from a regional warehouse. The results can be passed to another iBot that runs a request to locate alternative sources for these products. A final iBot may be triggered to feed information into a corporate CRM system, and notify the appropriate account representatives of the alternative sourcing.

When Siebel Delivers is enabled, you can add an Alerts section to any dashboard page. An Alerts section is automatically added to the first page of My Dashboard if one is not manually placed there.

For information about accessing active alerts, see .

Controlling Access to Siebel Delivers

Access to Siebel Delivers is available to all Siebel Analytics users (the Everyone group in Siebel Analytics Administration) by default. Granting access to specific Siebel Delivers functions is performed from the Privilege Administration page in Siebel Analytics Administration. If you have the appropriate authority, you can grant or deny explicit access to a variety of Siebel Delivers privileges, including the ability to perform the following actions:

■ Retrieve delivery destinations for iBots

■ Create iBots

■ Publish iBots for subscription

■ Deliver iBots to specified or dynamically determined users

■ Chain iBots

■ Chain iBots to custom scripts

■ See iBot instance errors

For more information about the Privilege Administration page, see *Siebel Analytics Web Administration Guide*.

Accessing Siebel Delivers

The following procedure explains how to access Siebel Delivers.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To access Siebel Delivers

■ Navigate to Siebel Analytics and click the Delivers link near the top of the screen.

   The Siebel Delivers start page appears.

Creating and Managing iBots Using the Siebel Delivers Start Page

The Siebel Delivers start page provides access to your personal and shared iBots, and contains links that allow you to perform the following actions:

■ Create a new iBot

■ Customize your subscriptions to iBots

■ Edit your delivery profile

■ View your current iBots

NOTE: What you see in Siebel Delivers depends on the permissions granted to your user ID, so you may not see all of the preceding links on your Siebel Delivers start page.

The start page has two main areas:

■ **Selection pane.** The selection pane is located on the left side of the page. It shows Delivers content saved in the Web Catalog, such as personal and shared iBots.

■ **Workspace.** The workspace is located to the right of the selection pane. It initially shows the iBot links that you can work with to create and manage your iBots.

When you make a selection from the selection pane, such as clicking a saved iBot, your selection appears in the workspace so you can work with it. When you click an iBot link in the workspace, the workspace displays tabs for working with iBots.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To work with Delivers content saved in the Web Catalog

1 Locate the item in the selection pane and click it.

   Your selection appears in the workspace, with links to access its properties.

2 To change a property, click its link.

To create a new iBot

1 Click the link Create New iBot.

The Overview tab appears, with default properties for the iBot.

2 To change a property, click its link.

To customize your iBot subscriptions

■ Click the link Customize Subscriptions.

For complete information, see "Customizing Your Siebel Delivers iBot Subscriptions" on page 165.

To edit your delivery profile

■ Click the link Edit Delivery Profile.

For complete information, see "Configuring Your Siebel Delivers Devices and Delivery Profiles" on page 166.

To show a list of your current iBots

1 Click the link Show Current iBots.

A list of iBots that are currently acting on your behalf appears.

2 To see the properties for an iBot, click its link.

To return to the Siebel Delivers start page from anywhere within Siebel Analytics

■ Click the Delivers link.

Reviewing Siebel Delivers iBot Settings

Use the Overview tab to view a summary of the current settings for the selected iBot.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To see detailed information about a current iBot setting

■ Click the setting for which you want to view more detailed information.

The display changes to show you the appropriate information.

Specifying Siebel Delivers iBot Priority, Data Visibility, and Impersonation

Use the General tab to specify the priority of the iBot and how to send the delivery content.

You can set the priority to low, normal, or high. The priority works with the delivery profile for a user to determine the destination for alerts of different priorities.

The following data visibility options affect the personalization of the delivery content:

■ Personalized (individual data visibility)

 This option uses the data visibility of each recipient to customize iBot delivery content for each recipient. This setting does not use the Run As field.

 NOTE: For requests, to have entries in the Analytics Server cache created for each user, choose this option. For more information, see "About System Services for the Siebel Delivers iBot" on page 162.

■ Not personalized (use the Run As user's data visibility)

 This option sends the iBot's delivery content to the specified recipients. All users receive the same content as if they were the same user. This user needs to be specified in the Run As field.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To specify the priority of the iBot and how to send the delivery content

1 Select the priority from the Priority drop-down list.

2 Select the data visibility from the Data Visibility drop-down list.

 If you select the Not personalized option, specify the user ID to act as the Run As user.

Selecting a Request to Trigger a Siebel Delivers iBot

Use the Conditional Request tab to select a request to trigger the iBot. You can further refine the request by using subqueries.

The results of the request determine whether the iBot sends its delivery content and initiates any subsequent actions:

■ If the request does not return any rows, the iBot is not triggered.

■ If the request returns at least one row, the iBot sends its delivery content and initiates any subsequent actions.

You can chain requests together to create complex conditional logic. For example, you might have a request that determines what the ten best-selling products were last year, and a second request that determines, for these products, the change in sales this year in each region, and then reports any products with a negative change.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To select the request
■ Click the Select/Replace Condition button to select the request, and then complete the dialog box that opens.

To refine the request using subqueries
■ Click the Refine Condition button to use the results from another request as conditions for the current iBot.

  You will need to map columns between the requests and the desired operators.

Scheduling a Siebel Delivers iBot

Use the Schedule tab to determine when the iBot runs, how often it runs, and when to discontinue running it.

iBots can execute based on a specified schedule. You can define a starting date and time for the iBot, a recurrence schedule, and an ending date.

You can also create a nonscheduled iBot. This is useful when you want to create an iBot that runs only as part of an iBot chain, or an iBot that is initiated by an external process.

NOTE: The dates and times you specify are for use by the Siebel Delivers server (the Scheduler) in scheduling the iBot. If the machine where the Scheduler resides is located in a different time zone, the dates and times used are those in the Scheduler's time zone, and not your time zone. Consult your Siebel Analytics administrator for the time zone of the machine running the Scheduler.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To create an iBot with no schedule
■ Click the Set Schedule option to remove the check mark.

To start the iBot now
■ Click the Start Immediately button.

To start the iBot at a specified date and time
1 Enter the date in the Start Date box (or click the calendar to select a date).

2 (Optional) Enter a starting time.

To execute the iBot multiple times within a day
1 Click the Repeat every check box.

2 Enter the interval between executions (in minutes), and the time to stop the repetition.

3 In the Daily area in the Recurrence section, specify Every 1 Day(s).

To execute the iBot one time only

■ Click the Run once option.

This is the default.

To execute the iBot on a daily schedule

■ Specify the daily interval, such as every 3 days.

To execute the iBot on a weekly schedule

1 Specify the weekly interval, such as every 1 week.

2 Select the days of the week when the iBot should run, such as Monday through Friday.

To execute the iBot on a monthly schedule

1 Specify either the day of the month or the day occurrence, such as the first Tuesday.

2 Select the desired months.

To select an ending date

■ Enter a date, or select a date from the calendar.

By default, no ending date is specified.

Selecting Users to Receive a Siebel Delivers iBot

Use the Recipients tab to select the users and groups to receive the delivery content of the iBot.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To send the delivery content to the creator of the iBot

■ Click the Me option.

To send the delivery content to multiple users

1 Click the option for a specific list of recipients.

2 Click the Select button to open the Select Recipients dialog box and specify the eligible users and groups.

For more information, see "Using the Select Recipients Dialog Box" on page 157.

To allow the recipients to be determined dynamically from the results of a conditional request

1 Click the following option:

Determine recipients from conditional request

2 To identify the column that contains the desired recipients, make a selection from the Column Containing Recipients drop-down list.

You can also specify a second column from the request.

3 To send a subset of the data in the delivery content, click the following option:

Show relevant rows only

For example, if a request runs, and only a subset of rows in the result pertains to a single user, only those rows are delivered.

To allow eligible users to subscribe to the iBot

1 Click the following option:

Publish for subscription

2 Click the Select button to open the Select Recipients dialog box and specify the eligible users and groups.

For more information, see "Using the Select Recipients Dialog Box" on page 157.

To disallow eligible users from subscribing to the iBot

■ Click the following option to remove the check mark:

Publish for subscription

Using the Select Recipients Dialog Box

The Select Recipients dialog box shows any currently selected recipients and available recipients.

To use the Select Recipients dialog box

1 To view recipients by groups, or by users and groups, make a selection from the drop-down list.

2 Click a user or group to select it, and then click the Select Recipients arrow button to move it into the list of recipients.

You can select multiple recipients by holding down the SHIFT or CTRL keys and selecting adjacent or nonadjacent recipients.

3 To remove a recipient, click a user or group to select it, and then click the Remove Recipients button.

You can use the SHIFT and CTRL keys to select multiple groups or users.

4 Click OK.

Specifying the Content for a Siebel Delivers iBot

Use the Delivery Content tab to specify the type of content to deliver with the iBot, such as a dashboard page or a saved request. Some content types have additional options, such as whether to apply filters from parent iBots to delivered content. You can also specify the delivery format for the content, such as HTML, PDF, or text.

You can include a short, descriptive headline to include with the content. The headline appears as the subject when the iBot is delivered. You can also add a text message to provide context for an iBot attachment.

If the delivery content is blank (no records are returned), you can add an explanation for this condition.

This section contains the following topics:

Delivery Content Choices for an iBot

You can specify the following delivery content choices for an iBot:

■ The results of the conditional request

■ A narrative text description of the conditional request

■ Dashboard pages from My Dashboard

■ Dashboard pages from public (shared) dashboards

■ Briefing Books

■ Saved requests (shared and private)

■ Disconnected Applications Dataset

Additional Options for iBot Delivery Content Choices

The following options are additional options for each type of delivery content.

■ Conditional Request (Narrative Text)

The field Narrative Text is an additional option. Use this field to specify dynamic text that references columns within the conditional request.

■ Dashboard Page

The following check box is an additional option:

Apply filters from parent iBots to delivered content

If you select this option, filters from any and all iBots used to generate the Conditional Request are applied to the referenced dashboard content.

■ Saved Request

The following check box is an additional option:

Apply filters from parent iBots to delivered content

If you select this option, filters from any and all iBots are used to generate the conditional request.

There are no additional options for the following delivery content types:

■ Conditional Request (Results)

■ Briefing Book

■ Disconnected Application Dataset

Delivery Format Options for iBot Delivery Content

The format options for included content depend upon the type on delivery content you select. The format options are listed in the Send Content As drop-down list. Not every type of content has all format options.

■ Device default

Siebel Delivers will use the device default to determine the content format.

■ HTML

Delivery content will be sent inline as HTML.

■ Attachment (HTML)

Delivery content will be sent as an HTML attachment.

■ Attachment (PDF)

Delivery content will be sent as a PDF attachment.

■ Plain Text

Delivery content will be sent in plain text format.

Procedures for Working with the Delivery Content Tab

This section provides procedures for using the Delivery Content tab to make selections for the iBot with which you are working.

To add a headline to appear as the iBot subject line

■ Type a short, descriptive headline into the Headline text box.

To select the delivery content for the iBot

1 Click the Select Content button.

The Choose Delivery Content dialog box appears.

2 Select the delivery content and click OK.

For more information, see "Delivery Content Choices for an iBot" on page 158.

3 Make your selections for additional iBot delivery content options, if any.

For more information, see "Additional Options for iBot Delivery Content Choices" on page 159.

4 Choose a format for the delivery content from the Send content as drop-down list.

For more information, see "Delivery Format Options for iBot Delivery Content" on page 159

To remove the delivery content for the iBot

■ Click the Clear Content button.

To add a text message to provide context for the iBot attachment

1 Click the following option:

If sent as attachment, include this text

2 Type the text into the text box.

To specify a text message to deliver to recipients when there is no iBot content to deliver to them

1 Click the following option:

Deliver this message when no records are returned

2 Type the text into the text box.

NOTE: You should enter text to be delivered to recipients when there is no iBot content to deliver to them. This might be all recipients, if the iBot is configured to run all requests as a specific user in the General tab. This can help these recipients understand that there was no data for them and that the iBot did not fail.

Selecting Destinations for a Siebel Delivers iBot

Use the Destinations tab to specify a range of desired devices and destinations for iBots. This section contains the following topics:

■ "About User Destinations for the Siebel Delivers iBot" on page 161

■ "About Specific Devices for the Siebel Delivers iBot" on page 161

■ "About System Services for the Siebel Delivers iBot" on page 162

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To specify devices and destinations for the iBot

■ Click on a check box next to a device or destination to select it for the iBot.

About User Destinations for the Siebel Delivers iBot

This section describes the user destinations available for the iBot.

■ Intelligence Dashboard

Active iBots will appear in a Dashboard Alerts section as well as on the Alerts! page. A link to this summary appears together with the application navigation links when new iBots are delivered. After these are reviewed, the alert link is removed.

■ Active Delivery Profile

iBots will be sent to specified devices in the active delivery profile. The active delivery profile is configured through the My Account page. For more information, see "Configuring Your Siebel Delivers Devices and Delivery Profiles" on page 166.

About Specific Devices for the Siebel Delivers iBot

If you select a specific device, your selection overrides the active delivery profile for a user. Devices specified here act as additions to the active delivery profile. An administrative iBot, for example, need not be dependent upon user configuration. It would, however, receive users' device information from their devices configured in My Devices.

For more information about active delivery profiles and My Devices, see "Configuring Your Siebel Delivers Devices and Delivery Profiles" on page 166.

These are the available devices:

■ Email

■ Pager

■ Digital Phone

■ Handheld Device

About System Services for the Siebel Delivers iBot

This section describes the system services available for the iBot.

■ Siebel Analytics Server Cache

This is used for seeding cache.

Siebel Analytics administrators can create Analytics Server cache for individual users. The cache seeding operation allows administrators to run requests on dashboard pages or requests stored in the Web Catalog, and create an Analytics Server cache. This speeds up response time for users when they actually run the requests on the dashboards. If data already exists in the cache for a given request, the data is deleted and refreshed when the iBot runs.

The cache for the request or the dashboard page is created at the appropriate schedule for the indicated set of users.

NOTE: To have the cache created for each user, choose the Personalized option for data visibility at the General tab.

You would typically not select any other destination for this kind of request.

■ Disconnected Application Cache

This setting is for organizations that have licensed Disconnected Siebel Analytics. It is related to the preprocessed synchronization mode in disconnected Analytics applications.

You can create server datasets for your mobile users, so that when they synchronize their applications, the data downloads are faster.

The preprocessed synchronization mode is the recommended data download mode for users. It avoids the potential overhead that can occur from running data creation requests in online mode during normal business hours and reduces wait time for the download. Preprocessed data is stored under each user's directory on the machine running Siebel Analytics Web. If you decide to use this mode to schedule data cache creation, make sure that adequate disk space is available. For more information about Siebel Disconnected Analytics, see *Siebel Analytics Server Administration Guide*.

NOTE: To have the disconnected application cache created for each user, choose the Personalized option for Data Visibility at the General tab. (Nonpersonalized data is not used for disconnected Analytics users.)

You would typically not select any other destination for this kind of request.

Specifying Actions to Execute at Siebel Delivers iBot Completion

Use the Advanced tab to specify one or more actions to execute when the iBot completes. Actions will be executed on behalf of each user who is a recipient of the iBot. You can change the default behavior for each iBot action. Actions include the execution of other iBots, custom scripts, or Siebel Workflows defined using the Siebel Workflow Version 7.7 application.

Added actions are shown with a Properties button that you can click to view or modify properties, and a Delete button that you can click to delete actions.

This section contains the following topics:

- "About iBot Action Properties" on page 163
- "About Custom Script Action Properties" on page 163
- "About Siebel Workflow Action Properties" on page 164
- "Procedures for Specifying Actions to Execute at Siebel Delivers iBot Completion" on page 164

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

About iBot Action Properties

You can specify the next iBot to run when the current iBot completes. The following options are the choices for the scope of recipients from the Execute for Recipients drop-down list.

- Of specified iBot

  Select this option to use the iBot referenced in this dialog.

- Of current iBot

  Select this option to use the current iBot containing subsequent actions.

- Of both specified and current iBot

  Select this option to use the union of both iBots.

- Common to specified and current iBot

  Select this option to use the intersection of both iBots.

- Of specific iBot, but not current iBot

  Select this option to use the referenced iBot and exclude recipients from the current iBot.

If you have filters from originating iBots applied to subsequent iBots, filter values are generated by the conditional request specified at the Conditional Request tab. The iBot specified at the Advanced tab will execute once for each row in the conditional report, with filters generated by the values in that row.

About Custom Script Action Properties

You can specify a custom script to execute when the current iBot completes. The custom script file must reside on the same server as the Siebel Delivers server (the Scheduler).

You can select options for whether results are passed to the script, as well as desired formats. You can also manually add additional parameters.

Depending upon the type of content to be passed (from either the conditional request or the delivery content), results may be passed in some of the following formats:

- MHTML
- XML
- Plain Text

■ CSV

■ PDF

About Siebel Workflow Action Properties

You can configure iBots to trigger workflows in the Siebel Workflow Version 7.7 application. By default, only Siebel Analytics administrators have the necessary privileges to configure iBots to trigger workflows. For information about the procedures to configure this capability, see *Siebel Analytics Scheduler Guide*.

Dynamic properties are generated by the conditional request specified at the Conditional Request tab. The Siebel Workflow will be initiated once for each row in the conditional request, with dynamic properties generated from the values in that row. You can also choose a column from a conditional request.

Procedures for Specifying Actions to Execute at Siebel Delivers iBot Completion

This section provides procedures for specifying the action to execute when the iBot completes.

To select the next iBot to run when the current iBot completes

1 Click the Add Action button and choose iBot.

2 Click the Browse button to select the next iBot to run.

3 Choose the scope of recipients from the Execute for Recipients drop-down list.

For more information, see "About iBot Action Properties" on page 163.

4 To specify that filters from originating iBots be applied to subsequent iBots, click the following option:

Propagate filters from parent

5 To add additional filters, click the Add button.

To remove all additional filters, click the Clear button.

To specify a custom script to execute when the current iBot completes

1 Click the Add Action button and choose Custom Script.

The Custom Script Properties dialog box opens.

2 Type the path to the script in the Filename text box.

NOTE: The script must reside on the same server as the Siebel Delivers server (the Scheduler).

3 Choose the script type from the Type drop-down list.

4 In the Results area, make your selections for whether results are passed to the script, and if applicable, the format in which to pass results.

5 To add additional parameters manually, click the Add button.

6 To remove all entered parameters, click the Clear button.

7 Click OK.

To specify a Siebel Workflow to execute

1 Click the Add Action button and choose Siebel Workflow.

The Siebel Workflow Properties dialog box appears.

2 Type the name of the Siebel Workflow in the Workflow Name field.

NOTE: Specify a Siebel Workflow defined using the Siebel Workflow Version 7.7 application.

3 To pass Name and Value pairs to the Siebel Workflow, enter them in the Static Properties section.

4 Click the Add button to add additional static properties.

To remove all added static properties, click the Clear button.

5 Enter the appropriate dynamic values in the Dynamic Properties section.

6 To add multiple dynamic properties, click the Add button.

7 To remove all added dynamic properties, click the Clear button.

8 To choose a column from a conditional request, select it from the Value Column drop-down list.

9 Click OK.

Customizing Your Siebel Delivers iBot Subscriptions

Use the Customize Your iBot Subscriptions page to view a list of iBots and change your current iBot subscriptions. You can also view more information about an iBot.

Your subscription list shows all iBots to which you are subscribed or to which you may subscribe, sorted by Web Catalog folder. A check mark next to the name of an iBot indicates that you are subscribed to it. If no other iBots are available for you to subscribe to, only your current subscriptions are shown.

NOTE: iBots to which you are automatically subscribed are not shown, because you cannot modify your automatic subscriptions.

For an overview of Siebel Delivers, see "Overview of Siebel Delivers" on page 149.

To view your current iBot subscription list

■ Navigate to Siebel Delivers and click the Customize Subscriptions link at the Siebel Delivers start page.

The Customize Your iBot Subscriptions page appears, showing your iBot subscription list.

To view more information about an iBot in your current iBot subscription list

1 Click the name of the iBot.

Information about the iBot appears in a new window. The Overview tab shows summary information for the iBot.

2 To see more detailed information about the iBot, click the appropriate link in the Overview tab, or click any other tab.

To change your current iBot subscription list

1 To subscribe to an iBot, click the check box next to the appropriate iBot name.

A check mark appears next to the iBot, indicating that you are subscribed to it.

2 To remove a subscription from an iBot, click the filled check box next to the appropriate iBot name.

The check box clears, indicating that you are no longer subscribed to the iBot.

3 To save your modified subscription list, click the Finished button.

Configuring Your Siebel Delivers Devices and Delivery Profiles

You configure your delivery devices and your delivery profiles through the My Account link. This link is available on the main page in Siebel Answers, Siebel Delivers, and Siebel Intelligence Dashboards.

Your devices and delivery profiles control how Siebel Delivers will reach you when an alert is triggered by an iBot. After you add one or more devices, you can create delivery profiles, and specify which delivery profile should be your active profile for receiving alerts.

CAUTION: If your Delivery Options area already contains devices and profiles, do not make any changes to the Delivery Options area without first consulting your Siebel Analytics administrator. (Any changes you make will override the delivery device and profile information that was configured for you.)

To configure a delivery option for Siebel Delivers

1 Navigate to Siebel Analytics.

2 Click the My Account link.

The My Account page appears.

3 To add a device, perform the following steps:

a Click the Add Device link.

The Device page appears.

b In the Category area, click the device you want to add.

This populates the Device Name field and the choices available in the Device / Provider list.

c Select the appropriate option for the device from the Device / Provider drop-down list.

d Enter the address for the device in the Address field.

For example, this would be an email address for email, or a telephone number for a digital phone.

NOTE: When typing a phone number for a device, do not use punctuation such as spaces, dashes, or parentheses.

e Click Finished to return to the My Account page.

The device appears in the My Devices list.

f To change information for the device, click the Edit link to go back to the Device page.

g If you decide you do not want the device, click the Delete link.

This removes the device from the My Devices area.

h To add another device, repeat the preceding steps.

4 To add a delivery profile, perform the following steps:

a Click the Add Delivery Profile link.

The Delivery Profile page appears.

For more information about your choices at the Delivery Profile page and how delivery profiles work, see "Using Siebel Delivers Delivery Profiles" on page 167.

b To change the profile, click the Edit link to go back to the Delivery Profile page.

c If you decide you do not want the profile, click the Delete link.

This removes the profile from the My Profiles area.

d To add another profile, repeat the preceding steps.

5 To make a Delivery profile the active profile, click the Select link next to the profile.

A check mark is placed next to the profile to indicate that it is the active delivery profile.

Using Siebel Delivers Delivery Profiles

Siebel Delivers uses your active delivery profile to determine how to reach you when an alert is triggered by an iBot, and which devices should receive delivered content. You configure your delivery profile from the My Account page. For information about accessing the My Account page to configure your delivery profile, see "Configuring Your Siebel Delivers Devices and Delivery Profiles" on page 166.

iBot contents can be delivered to a range of devices, including Web, wireless, mobile and voice devices. By default, iBot contents are available for delivery to the dashboard and the appropriate devices defined in your active delivery profile (based on the priority of the iBot contents). Content may be specifically directed to a device, and if so, you will receive content on that device if it is defined, even if it is not in your active delivery profile.

Content is delivered to the intersection of devices as determined by the active delivery profile and the specific devices defined for the target content. Content is delivered only once to a device, even if that device is in your active delivery profile and specifically selected as a delivery device for the iBot content. If a specifically requested device or active delivery profile cannot be found, iBot content is automatically pushed to the dashboard.

iBot content is assigned a specific priority. The default priority is normal. When you select devices for your active profile, you can indicate what priority content should be sent to that device. For example, if you have added a pager to your delivery profile, you might associate it with high priority content only. When you know that you will be away from your office frequently, and out of email range, you may select to receive only low priority content through your office email.

You can create any number of delivery profiles. Only one profile can be active at any given time, however.

To add or edit a Siebel Delivers delivery profile

1   At the Delivery Profile page, enter the name of the profile in the Name field.

2   For each device you want to use in the profile, select the priority of the content to be delivered.

   NOTE: Do not set the priority for devices that you do not want to use. Devices that do not have a priority selected are not used by the profile.

   You can select any or all priorities by clicking the appropriate check boxes.

3   Click Finished to save this profile and return to the My Accounts page.

   The profile appears in the My Profiles list.

Accessing Siebel Analytics Alerts

The Siebel Alerts page shows your currently active alerts and information about when the content was delivered. Depending on the settings for the alert, links appear that allow you to view active alert content, clear all occurrences of the active alert, open the iBot that generated the alert, or check current conditions by reexecuting the iBot that generated the alert.

When Siebel Delivers is enabled, you can add an Alerts section to any dashboard page. When alerts are present, the Alerts! link appears at the top of each Siebel Answers, Siebel Delivers, and Siebel Intelligence Dashboard page.

NOTE: An Alerts section is automatically added to the first page of your My Dashboard if one is not manually placed there.

To access alerts

1 Click the Alerts! link from Siebel Answers, Siebel Delivers, or Siebel Intelligence Dashboards.

   The Siebel Alerts page opens, in a new window, showing the headline, delivery date and time, and number of occurrences for each active alert.

2 To work with an alert, click the appropriate link.

Index