



**APPLICATIONS
ADMINISTRATION GUIDE
MIDMARKET EDITION**

VERSION 7.5, REV. A

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Introduction

This guide covers general administration tasks for initial setup and ongoing maintenance of Siebel eBusiness Applications, MidMarket Edition.

Specialized applications administration tasks are covered in a number of other books. See the *Siebel Bookshelf* CD-ROM.

NOTE: All Siebel MidMarket product names include the phrase *MidMarket Edition* to distinguish these products from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name will be given in abbreviated form. For example, after Siebel Call Center MidMarket Edition, has been mentioned once, it will be referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to make sure it will be properly identified and handled.

This guide is primarily useful to people whose title or job description matches one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications possibly adding new functionality.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Call Center Administrators	Persons responsible for setting up and maintaining a call center. Duties include managing message broadcasts.

How This Guide Is Organized

The next four chapters of this guide should be read in the order presented. These chapters will be of interest to most readers.

The remaining chapters contain stand-alone topics about administering specific features of Siebel eBusiness Applications, MidMarket Edition. These chapters can be read in any order.

The appendix in this guide contains a table of system preferences.

Additional Resources

You can find information about other administration tasks in the following books:

- *Siebel Campaigns Guide, MidMarket Edition*
- *Siebel Service Guide, MidMarket Edition*
- *Siebel Forecasting Guide, MidMarket Edition*
- *Siebel Professional Services Automation Guide, MidMarket Edition*
- *Security Guide for Siebel eBusiness Applications, MidMarket Edition*
- *Global Deployment Guide, MidMarket Edition*
- *Siebel eSales Administration Guide, MidMarket Edition*
- *Siebel Territory Assignment Manager Administration Guide, MidMarket Edition*
- *Siebel Communications Server Administration Guide, MidMarket Edition*

Revision History

Applications Administration Guide, MidMarket Edition, Version 7.5, Rev. A

April 2003 Bookshelf

Table 1. Changes Made in Rev. A for April 2003 Bookshelf

Topic	Revision
About Siebel eBusiness Applications	Deleted this chapter.
“Assigning Skills” on page 34	Removed procedures from this section. The Assigning Skills procedures have been moved to the <i>Siebel Assignment Manager Administration Guide</i> .
“Setting Up Locales” on page 35	Added a note to the Short Date Format field description about how incorrect dates are handled.
“Modifying a List of Values” on page 98	Added the second bullet.
Chapter 5, “Audit Trail”	In Siebel MidMarket Edition, the Siebel Web Client supports the database auditing only.
“Enabling and Disabling Message Broadcasting” on page 116	Added a procedure on how to enable and disable Message Broadcasting on the server.
“Creating a Message Broadcast” on page 119	Added a note about the importance of setting the correct server time to the field descriptions Activation Date/Time and Expiration Date/Time.
Chapter 7, “Messages”	Added this chapter.
“Hardware Requirements” on page 199	The document Server is supported on both the Windows 2000 and Windows XP platforms.
“Enabling HTML Generation (Optional)” on page 201	Added a note.

Once the Siebel system is successfully installed, you need to enter license keys so that you and your organization can access the Siebel products that your organization has purchased. After the license keys have been entered, you will be ready to set up your Siebel applications.

Before you can begin to use your Siebel applications, the software listed in [Table 2](#) must be correctly installed.

Table 2. Required Software

Software	For Information, See
Siebel Gateway Server	<i>Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition</i>
Siebel Server	
Siebel Database Server	
Siebel eBusiness Applications	Application-specific administration guide and this guide.
Either Siebel Dedicated Web Client or Siebel Tools	<i>Siebel Web Client Administration Guide, MidMarket Edition</i> or <i>Siebel Tools Reference, MidMarket Edition</i>

Once these Siebel servers and applications are successfully installed, you can proceed to enter license keys for specific Siebel applications.

Starting the Application for the First Time

In order to begin setting up your Siebel application, you must log in with administrative responsibilities. The Siebel database server installation script creates a Siebel administrator account that you can use to perform administrative tasks. The default user ID and password are SADMIN and SADMIN (case-sensitive). Your database administrator may also have created a user ID and password that allows you to access the Siebel Server and perform the required setup. To set up entities in the Group Administration view, you must be connected to the Siebel Server; you will not have full administrative capabilities for this view if you are connected to the local database or working in a mobile Web client.

NOTE: The responsibility for the SADMIN ID that comes with Siebel applications cannot be modified. However, you can copy this responsibility and modify the copy. For more information, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.

You can start Siebel applications from the Siebel Dedicated Web Client or from the Siebel Web Client. Instructions for both are described below.

TIP: If you have not yet entered any license keys, you must enter the first license key from the Siebel Dedicated Web Client or from Siebel Tools. For more information, see [“Entering License Keys” on page 16](#).

To start a Siebel application from the Siebel Dedicated Web Client for the first time

- 1 From the Start menu, choose Programs and then choose your Siebel application.
- 2 Enter SADMIN in the User ID and Password fields.
- 3 In the Connect to field, choose the server database from the drop-down list and click OK.

For information about the other databases available in the Connect to drop-down list, see [“Selecting a Datasource” on page 22](#).

- 4 If a message tells you that there is no valid license key, click OK.

- 5** In the License Key dialog box, enter the Siebel eBusiness base application license key and click OK.

For more information about license keys, see [“Entering License Keys” on page 16](#). If you need to enter additional license keys, see [“Entering an Additional License Key” on page 18](#).

To start a Siebel application from the Siebel Web Client for the first time

- 1** Open your Web browser.
- 2** Go to the URL for your Siebel Web Client.

The login screen appears.

- 3** Enter SADMIN in the User ID and Password fields and click OK.

NOTE: If a message tells you that you have not been licensed for this feature, you must enter a valid license key, using either Siebel Tools or the Siebel Dedicated Web Client, before you can access the application. For more information, see [“Entering License Keys” on page 16](#).

Entering License Keys

The Siebel license key is generated so that your organization's users can access the Siebel products that your organization has purchased. The license key is a series of numbers (up to 54 digits). Your organization's specific license key is included in the Welcome Package. You must enter this license key before you begin to use the Siebel product, products, or optional modules that your organization has purchased. Because the license key resides in the database and not on the client machine, everyone who accesses the Siebel database uses the same license key.

Your license key activates the screens and views associated with the applications and modules that your organization has purchased. If you have been assigned multiple license keys, their effect is cumulative, as you enter them.

Customers upgrading from earlier versions of Siebel software may notice differences between the Siebel product and the products listed in the Welcome Package. These generally reflect changes in naming and bundling of Siebel products. For example, a functionality that was previously sold separately might now be bundled into a single product, or included in a base application, or simply have been renamed. It is recommended that you run the application itself to verify that all of the functionality that you expected is there.

Customers using Siebel products which are upgrades from earlier versions may notice differences between the views in the previous product and the views in the upgraded product. Reasons for this may include the following:

- The view you are looking for is not available from the application that you have launched.
- You logged in as a user who does not have responsibilities for the view. In order to evaluate all of the views available in the product, log in as a Siebel administrator.
- The method of accessing the functionality may have changed, or the functionality may have been replaced by more comprehensive features that work differently. Consult the *Siebel Bookshelf* for information on functionality changes in the latest release.
- The location or name of the screen or view may have changed. You can review the Site Map or consult the *Siebel Bookshelf* for information on current view locations.

However, if you do not see views that you expected, or if you see views that you did not expect, and feel that it impacts the functionality you have purchased, contact Siebel Technical Support as soon as possible. If your license key has expired, contact Siebel Technical Support.

Entering the First License Key

Before you enter the first license key, the following software must be correctly installed: Siebel Gateway Server, Siebel Server, Siebel Database Server, Siebel eBusiness Applications, and one of the following: Siebel Dedicated Web Client or Siebel Tools. After the first Siebel Dedicated Web Client or Siebel Tools installation, the first user to connect to the Siebel database is required to enter a license key in order to use the product.

To enter the first license key

- 1** Start either Siebel Dedicated Web Client or Siebel Tools.

NOTE: You have the choice of entering the first license key in either Siebel Dedicated Web Client or Siebel Tools. You can enter any Siebel license key in either Siebel Dedicated Web Client or Siebel Tools.

- 2** Log in as the system administrator and connect to the server database.

Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list.

NOTE: If you are the first to log in to Siebel Dedicated Web Client after a new Siebel installation, you will get the error message “There is no valid license key in the database.” If you are the first to log in to Siebel Tools after a new Siebel installation, you will get the error message “No valid license keys were found in the database.”

- 3** If you are logged in to Siebel Dedicated Web Client, click OK. If you are logged in to Siebel Tools, click Add Key.

- 4 In the License Key dialog box, enter the Siebel eBusiness base application license key or the Siebel Tools license key, and then click OK.

CAUTION: Enter only a Siebel eBusiness base application license key or the Siebel Tools license key. If you enter an optional-module license key without having a Siebel eBusiness base application license key already entered, an error message will appear. The error occurs because the Home Page view is required to start Siebel eBusiness base applications, and Home Page views are not included in optional module license keys.

- 5 Close Siebel Dedicated Web Client or Siebel Tools, whichever you started in [Step 1 on page 17](#).
- 6 Start the Siebel application associated with the license key that you entered.

For example, if your license key is for Siebel Sales, start Siebel Sales; if your license key is for Siebel Tools, start Siebel Tools.

NOTE: After entering the initial license key, if you discover that you made an error when entering the license key, you can correct the license key in the Key Value field in the Application Administration screen, License Key view.

Entering an Additional License Key

After entering the initial key, you can add or delete license keys as long as your Siebel user responsibility includes the Siebel License Key view. You can do this immediately if your purchase included more than one license key, or you can add license keys as your organization purchases more Siebel applications or optional modules.

To enter an additional license key using a Siebel application

- 1 Start the Siebel application—for example, Siebel Call Center. You can use Siebel Web Client or Siebel Dedicated Web Client.

- 2** Log in as the system administrator and connect to the server database.

Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list. If the system administrator's password has been changed, use the current password.

- 3** From the application-level menu, choose View > Site Map > Application Administration > License Keys.

- 4** Add the new license key:

- a** In the License Keys list, click New to create a new record.
- b** In the new record, enter one license key in the Key Value field.
- c** Repeat [Step a](#) and [Step b](#) for each license key to be entered.

- 5** Close the application.

Start any Siebel application or module associated with a license key you have entered.

If you have any problems installing your license keys, contact Siebel Technical Support.

To enter an additional license key using Siebel Tools

- 1** Start Siebel Tools.

NOTE: To enter additional license keys in Siebel Tools, you must have first entered the Siebel Tools license key.

- 2** Log in as the system administrator and connect to the server database.

Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list. If the system administrator's password has been changed, use the current password.

- 3** Choose Help > Technical Support from the menu bar.

- 4** In the Technical Support Information dialog box, click License Key.

- 5** Add a license key:
 - a** In the License Keys dialog box, click Add Key.
 - b** In the new record, type in one license key and then click OK.
 - c** Repeat Steps a and b for each license key to be entered.
- 6** Close Siebel Tools.

Start any Siebel application or module associated with a license key you have entered.

License Key Fields

[Table 3](#) describes the fields in the license key record.

Table 3. Fields in the License Key Record

Field	Description
Key Value	The license key from your Welcome Package. Add a new record for each license key.
Status	Automatically entered based on the license key. OK means the license key has not expired. Expired means the license key has expired.
MaxUsers	Automatically entered based on the license key. The maximum number of concurrent users allowed in your license agreement with Siebel Systems.
Expires	Automatically entered based on the license key. The expiration date for the license key in your license agreement with Siebel Systems.

Hiding Access to License Keys

There are two ways that you can hide access to license keys: hiding the License Keys administrative view within Siebel applications and hiding the License Key button within Siebel Tools.

- **Within Siebel Applications.** You may want to hide the License Keys view in the Application Administration screen, in order to discourage unauthorized users from attempting to change license keys. To hide the License Keys view, remove it from the responsibility associated with the users who should not have access to it. Responsibilities control the views to which users have access. For more information about creating and modifying responsibilities, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.
- **Within Siebel Tools.** You may want to disable the License Key button, found in the Technical Support Information dialog box (available from the Siebel Tools Help menu), in order to discourage unauthorized users from attempting to change license keys. You can disable the License Key button by selecting the Siebel Administrator responsibility and deleting the Edit License Key view.

Selecting a Datasource

When you start a Siebel application from the Siebel Dedicated Web Client, you specify the datasource to which you want to connect.

The following databases are potentially available to administrators and end users:

- **Local.** Resides on your local computer. Can be synchronized with the corporate database. Typically stored on a laptop computer and used by mobile users who are not connected to a server when working.
- **Server.** This is your enterprise server database.
- **Sample.** A database of sample data, stored on your workstation. Using this database, you can experiment with a Siebel application without risk of damaging actual organizational data.

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

About the Sample Database

Siebel eBusiness Applications include a sample database to use in demonstrating, evaluating, or experimenting with the Siebel client and Siebel Tools. (For more information, see *Siebel Web Client Administration Guide, MidMarket Edition*.)

The sample database includes a number of demo user accounts (SADMIN is one of these). Each of these has a predefined responsibility that reflects the demo user's position within the sample organization. If you log in to the sample database as a demo user, you can access certain views within Siebel eBusiness Applications based on the demo user's responsibility.

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

For more information about the sample database, see *Release Notes*.

Seed Data

The enterprise database of your default Siebel application contains some built-in *seed data*, such as organization, division, position, responsibility, and employee records. You can use this seed data for training or testing, or as templates for the real data that you enter. For more information on seed data, including descriptions of seed data records, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.

Summary of Applications Administration Tasks

[Table 4](#) summarizes the additional application administration tasks necessary to set up various Siebel eBusiness applications and optional modules.

Table 4. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Use any base application (for example, Siebel Sales or Siebel Call Center)	Initial Setup tasks.	Chapter 2, “Initial Setup”
	Ongoing administration tasks.	Chapter 3, “Ongoing Application Administration Tasks”
Control access to views or data	Establish a strategy for controlling access to views and data: <ul style="list-style-type: none">■ Establish the business environment (such as organizations, divisions, territories)■ Add employees■ Assign responsibilities to employees	<i>Security Guide for Siebel eBusiness Applications, MidMarket Edition</i>
Launch a global deployment	Locale and language administration tasks.	“Setting Up Locales” on page 35 “Setting Up Languages” on page 78 <i>Global Deployment Guide, MidMarket Edition</i>
Manage global accounts	Account administration tasks: Set up global account hierarchies.	Chapter 8, “Global Accounts”
Use Application Services Interfaces (ASIs) for accounts or contacts	Set up Web services and activate workflows for the ASIs.	Chapter 16, “Integration Using ASIs”
Create catalogs for data, including products	Create catalogs for products, literature and solutions.	<i>Siebel eSales Administration Guide, MidMarket Edition</i>
Use Correspondence functionality	Set up the Siebel Document Server, and create templates.	Chapter 13, “Correspondence”

Table 4. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Use the calendar to set up resources, such as conference rooms, equipment, and projectors	Calendar administration tasks.	Chapter 11, “Calendar”
Use Territory Assignment Manager to automatically assign tasks to appropriate users	Create skills and other criteria.	<i>Siebel Territory Assignment Manager Administration Guide, MidMarket Edition</i>
Use Siebel Marketing	Marketing administration tasks.	<i>Siebel Campaigns Guide, MidMarket Edition</i>
Manage lists of contacts and prospects	List Management tasks.	<i>Siebel Campaigns Guide, MidMarket Edition</i>
Use Time Sheets and Expense Reports	Time Sheet and Expense Report setup tasks, such as creating work types.	<i>Siebel Professional Services Automation Guide, MidMarket Edition</i>
Manage Service schedules, Service Assets, Warranties	Service administration tasks.	<i>Siebel Service Guide, MidMarket Edition</i>
Manage orders and the order process	Order administration tasks.	<i>Siebel Order Management Guide, MidMarket Edition</i>

Once your Siebel products are successfully installed, you need to perform a number of tasks to set up and administer the application.

Initial setup tasks are those which must be completed in order for your Siebel applications to work correctly, and then may be done infrequently, for instance, as your company grows.

Ongoing tasks are done on an occasional or ongoing basis, and are described in [Chapter 3, “Ongoing Application Administration Tasks.”](#)

Summary of Initial Setup Tasks

Table 5 summarizes the initial setup tasks and the order in which you should perform them.

Table 5. Required Tasks During Setup

Task	Comments
Add any custom views.	<p>Custom views are created in Siebel Tools and must be added to your Siebel application. Custom views should be added to the Views view before you define responsibilities. For information about adding views, see “Adding Views to the Application” on page 30.</p> <p>For information about creating custom views and about troubleshooting view visibility issues, see <i>Siebel Tools Reference, MidMarket Edition</i>.</p>
Determine access control strategy and define business environment structure.	<p>Siebel applications can be set up to support many strategies for your company to control access to views and data. These strategies include methods such as defining your business environment structure (organizations, internal and external divisions, and so on), defining employee positions, and creating access groups so that specific groups of people have access to specific views and data.</p> <p>These decisions should be made early in the deployment process, so that the strategy can be implemented during the initial setup.</p> <p>For more information about controlling access to views and data, and the procedures for implementing access control, see <i>Security Guide for Siebel Applications, MidMarket Edition</i>.</p>
Enter employee records into system (database and application) and determine employee access to views and data.	<p>Enter employee records after you have defined your business environment structure. You will need to assign at least one responsibility to each employee, and you may also assign organizations, positions, or other access control parameters.</p> <p>For more information about entering or deactivating employee records, see <i>Security Guide for Siebel Applications, MidMarket Edition</i>.</p>

Table 5. Required Tasks During Setup

Task	Comments
Complete employee setup.	For information about associating additional information to an employee record, see “Completing Employee Setup” on page 31 .
Set up locales.	Locale Codes and parameters are necessary for a global deployment. For more information, see “Setting Up Locales” on page 35 .

Adding Views to the Application

Developers create new views through Siebel Tools. In order for the views to become available for administrators to work with, you must add them to the Views screen in the application before you define your business environment.

Example: You want to add an Opportunities view in the Activities screen. In Siebel Tools, you create the view and name it Activities Opportunities. (For details on creating views, see *Siebel Tools Reference, MidMarket Edition*.) In your Siebel application, you follow the steps below and add the Activities Opportunities view in the View Administration view. After it has been added in both places, the view can be made accessible to the appropriate users. For details about controlling visibility to views, see *Security Guide for Siebel Applications, MidMarket Edition*.

To add customized views to the Siebel application

- 1** From the application-level menu, choose View > Site Map > Application Administration > Views.
- 2** In the Views list, add a new record.
- 3** Enter the view name exactly as it is defined in Siebel Tools, and a description of the new view.

You generally do not need to modify or delete views that are already listed. You would only need to modify a view if its name was changed in Siebel Tools. A view would need to be deleted only if it no longer existed in the data model schema, or if you did not want anyone to have access to it. Instead of deleting views, administrators should remove the views from responsibilities and keep them in the database.

NOTE: Only visibility-level views can be configured to appear in the Site Map. For more information, see *Siebel Tools Reference, MidMarket Edition*.

Completing Employee Setup

After completing the employee setup procedures described in the *Security Guide for Siebel Applications, MidMarket Edition*, which are required to allow employee access to the Siebel application, views and data, you complete employee setup by providing additional information. This can include the following:

- **Territory Assignment Rules.** Allows you to see and administer the assignment rules for an employee. For more information on assignment rules, see *Siebel Territory Assignment Manager Administration Guide, MidMarket Edition*.

NOTE: You must be logged on to a server database to use the Employee Assignment Rules view.

- **Availability.** Used for Siebel Professional Services Automation. Lists the projects for which an employee is on staff, or for which an employee has been requested. For more information, see *Siebel Professional Services Automation Guide, MidMarket Edition*.

NOTE: Employees can also change their availability in the Availability view on the User Preferences screen.

- **Exception Hours.** Specifies what days and hours an employee is not available.
- **Utilization.** Displays a chart with the monthly and quarterly utilization of the currently selected employee. Managers use this chart for monitoring professional services projects and employees. For more information about professional services, see *Siebel Professional Services Automation Guide, MidMarket Edition*.
- **Tools.** Defines the tools that service engineers carry with them or have access to. It allows a call center person to check whether the engineers have the correct tools for the jobs they are assigned to.
- **Job Information.** Specifies the job profile, salary, compensation ratio, pay currency, and location of employee.

- **Calendar administration.** Defines the calendar properties and access for an employee. For more information about Calendar administration, see [Chapter 11, “Calendar.”](#)
- **Territory Assignment Skills.** Defines an employee’s skills and skill items, along with their level of expertise. Skills can be used as assignment criteria in Siebel Territory Assignment Manager. For more information about how the Siebel application uses skills, see *Siebel Territory Assignment Manager Administration Guide, MidMarket Edition*.

Skills can also be used in the Professional Service Automation product for managing resources. For information about these types of skills, see *Siebel Professional Services Automation Guide, MidMarket Edition*.
- **Employee Query.** Allows queries to identify employees with particular skills and expertise.
- **Service Details.** Provides details about the shift start and end locations, hourly costs, overtime availability and other details for a service employee.
- **Competency.** Provides a list of areas in which the employee has some demonstrated level of knowledge or accomplishment.
- **Education.** Provides details of an employee’s education history.
- **Past Work Experience.** Provides details of an employee’s work history.
- **Honor/Award.** Provides list of honors and awards earned by an employee.
- **Membership.** Provides details of an employee’s memberships in various organizations.
- **Certification.** Provides details of an employee’s certification.

To complete the employee setup

- 1 From the application-level menu, choose View > Site Map > User Administration > Employees.
- 2 In the Employees list, select the employee for whom you want to add additional information.

- 3** In the More Information form complete any necessary fields. Some of the fields are described in the following table.

Field	Description
Configuration	Specifies which Siebel product or group of software components to associate with the currently selected employee. For more information, see <i>Siebel Anywhere Administration Guide, MidMarket Edition</i> .
Available Until	May be used to indicate the active period of an employee. Used in conjunction with the Availability, Overtime Availability, and Next Available fields.

- 4** Click any other appropriate view tab.
- 5** Add a new record, if needed.
- 6** Enter the appropriate information.

Assigning Skills

At the levels of organizations, positions, and employees, you can add skills. Skills are used to search for employees for certain projects. You create skills with Siebel Tools.

Employees can track and update their own skill profiles in the User Preferences Availability view.

For more information about how your Siebel application uses skills, see *Siebel Territory Assignment Manager Administration Guide, MidMarket Edition*.

Setting Up Locales

A locale is a set of rules guiding how common data is displayed to the user or received from the user. These rules are used to format data from a database before displaying the resulting information in output fields on the user interface. Siebel applications support language and geographical conventions for the display language of picklists, and formatting of data such as dates, time, numbers, and currency based on locale settings.

The Locale information is stored in the Locale Table (S_LOCALE). The data in this table is maintained by the administrator using the Locale Administration view.

The locale with which the Component Object Manager processes are initialized is determined by the value of the parameter Locale Code. Although this is set during installation, it may be changed to the locale code of any locale that is preconfigured with the Siebel application or added by the administrator. The Locale Code parameter can be set at the Enterprise, Server, or Component level.

A number of locales and their parameters come prebuilt with the standard Siebel application. You can also create and revise locales in the Locale Administration view.

After a locale and its parameters are defined, you can create translations for locale names that will display in the locale pick applet, rather than the three letter acronym locale code. For example, instead of showing ENU as locale name, the administrator provides *English-United States* as a translation for English speakers and *Inglese-Stati Uniti d'America* for Italian speakers. Only translated locale names are exposed to end-users on locale pick applets.

NOTE: Whereas the Siebel Web Clients use the locale settings specified on the Siebel Server, the Siebel Mobile Web Client and the Siebel Dedicated Web Client use the locale settings defined in the client operating system's regional settings.

To create a locale

- 1 From the application-level menu, choose View > Site Map > Application Administration > Locale.

- 2** In the Locale list, create a new record and fill in the necessary fields.

Some of the fields are described in the following table.

Field	Description
Date Separator	Designates the symbol that will be used to separate the components of the date.
International Dialing Code	<p>Designates the country codes to display in phone numbers, suppressing the country code for phone numbers that are in the user's locale. For example, if the phone numbers for two accounts are the following:</p> <ul style="list-style-type: none">■ + 33 1-23 42 34 56, for an account based in France (+ 33 is the country code for France)■ + 1 6502955000, for an account based in the U.S. (+ 1 is the country code for the U.S.) <p>To a user based in the U.S.(locale ENU) the International Dialing Code value is "USA and Canada (1)", and the above phone numbers will display as:</p> <ul style="list-style-type: none">■ + 33 1-23 42 34 56■ (650) 295-5000
List Separator	<p>Designates the symbol that will be used to separate consecutive numbers in a list.</p> <p>For example:</p> <ul style="list-style-type: none">■ In the U.S., consecutive numbers are separated by a comma: 1.23,3.57,4.01■ In France, consecutive numbers are separated by a semi-colon: 1,23;3,57;4,01
Locale Code	<p>Siebel applications use the three letter acronym (TLA) code conventions of Microsoft for locale name. In most cases, the TLA is created by taking the two-letter language abbreviation from the ISO Standard 639 and adding a third letter as appropriate to form a unique identifier.</p> <p>For examples of language (locale) codes, see <i>Global Deployment Guide, MidMarket Edition</i>.</p>

Field	Description
Locale Name	The naming convention is generally <i>Language Name–Territory</i> , for example, English–United States, English–United Kingdom, or French–France.
Long Date Format	Not supported.
Negative Currency Format	Specifies the location of the negative sign (-) with respect to the currency symbols and digits (100). For example: <ul style="list-style-type: none"> ■ For U.S. format, (\$32.45), select (s100) ■ For British format, -£32.40, select -s100
Number Decimal Separator	Specifies the symbol used to indicate the decimal place. For example: <ul style="list-style-type: none"> ■ French format: 1 234,34 (comma as decimal symbol) ■ U.S. format: 1,234.34 (period as decimal symbol)
Number Fractional Digits	Designates the number of digits after the decimal separator. For example, the number 12.340 has a number fractional of 3. This applies to data fields of type DTYPE_NUMBER.
Number Grouping Separator	Designates the symbol used to group numbers. For example: <ul style="list-style-type: none"> ■ French format: 1 234 (space as number grouping separator) ■ German format: 1.234 (period as number grouping separator) ■ U.S. format: 1,234 (comma as number grouping separator)
Number Leading Zero	Designates whether to display a leading zero in numbers less than one. For example, .7 or 0.7.
Positive Currency Format	Specifies the location of the currency symbols with respect to the digits (100). For example: for U.S. format, \$32.45, select s100.

Field	Description
Short Date Format	<p>Specifies the appropriate shortened date format.</p> <p>For example:</p> <ul style="list-style-type: none">■ International format: yymmdd■ U.S. format: mm/dd/yy■ German format: dd.mm.yy <p>The forward slash in the string mm/dd/yy is actually a place holder. It is replaced with the symbol specified in the Date Separator field. For example, if the Date Separator value is a dash, -, then April 10, 2002 will be displayed as 04-10-2002.</p> <p><i>Note:</i> If you enter a month number greater than 12, it defaults to 12. If you enter a day number greater than the number of days in the month, it defaults to the last day of the month. For example, if you enter 42/99/03 (U.S. format), the date defaults to 12/31/03.</p>
Time AM Designator	<p>Specifies the symbol for designating time between 00:00 and 12:00.</p> <p>For example: AM, a.m., am</p>
Time Leading Zero	<p>Designates whether to display a leading zero in time fields.</p> <p>For example:</p> <p>12 hour clock with leading zero: 01:03 AM, 01:03 PM</p> <p>12 hour clock without leading zero: 1:03 AM, 1:03 PM</p> <p>24 hour clock with leading zero: 01:03, 13:03</p> <p>24 hour clock without leading zero: 1:03, 13:03</p>
Time PM Designator	<p>Specifies the symbol for designating time between 12:00 and 24:00.</p> <p>For example: PM, p.m., or pm</p>
Time Separator	<p>Specifies the symbol used to separate the hours from the minutes.</p>
UI Directionality	<p>Designates the direction of the text displayed.</p>

To create a translation for a locale name

- 1** From the application-level menu, choose View > Site Map > Applications Administration > Locale, and select the appropriate record.
- 2** Click the Locale Name Translation view tab.
- 3** On the Locale Name Translation list, create a new record and fill in the necessary fields, as described in the following table.

Field	Description
Language	Designates the language code of the translation of the locale name. For examples of language codes, see <i>Global Deployment Guide, MidMarket Edition</i> .
Translated Name	<p>The exact translation of the locale name to appear in the picklist for users with the designated language code. For example, for the locale English–United States:</p> <ul style="list-style-type: none">■ With ENU language code, the locale name is English–United States.■ With ITA language code, the locale name is Inglese–Stati Uniti d’America.
Description	Translated description of this locale.

Setting Up Satmetrix Survey Reports

NOTE: This section only applies to those who have purchased Siebel Satmetrix eSurveys or who have purchased surveys directly from Satmetrix Systems.

In order to view Satmetrix survey reports through your Siebel application, you need to:

- Add the Account Satmetrix Survey View view to the appropriate user responsibilities. For information about how to add views to responsibilities, see *Security Guide for Siebel Applications, MidMarket Edition*.
- Enter the secret key string provided by Satmetrix Systems into the Satmetrix Key Value system preference. For information about how to change system preferences, see [Chapter 3, “Ongoing Application Administration Tasks.”](#)
- Extend the List of Values for WI_ARG_TYPE as described in [“To extend the List of Values for WI_ARG_TYPE.”](#)
- Set up the symbolic URL for access to the Satmetrix reports server, as described in [“To set up the symbolic URL for access to Satmetrix Reports.”](#)

To extend the List of Values for WI_ARG_TYPE

- 1 From the application-level menu, choose View > Site Map > Application Administration > List of Values.

- 2** Create a new record, and complete the fields as shown in the following table.

Field	Value
Type	WI_ARG_TYPE
Display Value	Satmetrix
Language-Independent Code	Satmetrix
Active	Yes
Translate	Yes
Replication Level	All

For more information about adding List of Values records, see [Chapter 4, “Working with Lists of Values.”](#)

To set up the symbolic URL for access to Satmetrix Reports

- 1 From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.
- 2 In the Symbolic URL list, select SatmetrixSurvey.
- 3 Make sure the URL is the URL for the reports server provided by Satmetrix Systems.
- 4 In the Symbolic URL Arguments list, complete the fields, using the following table as a guide.

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Sequence
EncodeUrl	Yes	Command	FALSE	Yes	1
version	Yes	Constant	<i>Obtain from Satmetrix</i>	Yes	2
windowSize	Yes	Command	WebControl width = 1000 height = 500 border = 1	Yes	3

Initial Setup

Setting Up Satmetrix Survey Reports

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Sequence
type	Yes	Constant	acct	Yes	4
acctid	Yes	Field	Id	Yes	5
acctname	Yes	Field	Name	Yes	6
contactid	Yes	Constant	*	Yes	7
contactname	Yes	Constant	*	Yes	8
user	Yes	Profile Attribute	Login Name	Yes	9
domain	Yes	Constant	<i>Obtain from Satmetrix</i>	Yes	10
model	Yes	Constant	<i>Obtain from Satmetrix</i>	Yes	11
created	Yes	Field	Timestamp	Yes	12
token	No	Satmetrix	Satmetrix Surveys, CalculateToken	Yes	13

Ongoing Application Administration Tasks

3

This chapter assumes that you have successfully installed your Siebel product and have completed the tasks in [Chapter 2, “Initial Setup.”](#)

The tasks described in this chapter set up defaults that are used throughout your Siebel application. For some implementations, the default settings provided through the seed data meet a company’s needs without customization. In other cases, administrators find it useful to make adjustments to these defaults.

Setting System Preferences

System preferences control how Siebel applications operate in your environment. You need to review default settings and modify these as appropriate for your environment.

For a list of the system preferences in Siebel applications, see [Appendix A, “System Preferences.”](#)

To set system preferences

- 1** From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2** Check that the default System Preference Values are correct in your environment, or change values for system preferences as needed.

Setting Up Predefined Queries

Predefined queries (PDQ) automate queries that a user can perform online. Rather than creating a query, entering criteria, and running the query, the user selects a PDQ from the Queries drop-down list.

Predefined queries can be private (available only to the person who created them) or they can be public (available to all the users of the application).

Both public and private predefined and user-defined queries are stored in the database table S_APP_QUERY.

There are two ways to set up predefined queries:

- Create and execute a query in the usual way, and then save the query.
- Create or modify a predefined query in the Predefined Query screen.

For more information about the syntax of Siebel queries, see *Fundamentals, MidMarket Edition* and *Siebel Tools Reference, MidMarket Edition*.

When setting up queries, remember:

- The Administrator can define a PDQ using both displayed and nondisplayed fields.
- You can reference only fields from the current applet's business component in your query.
- On occasion, using the wildcard * to find all entries in a field may cause a performance problem. If it does, use IS NOT NULL instead. For more information about query operators, see *Siebel Online Help*.
- Predefined queries are defined on a business object. All screens based on the same business object will display all the predefined queries created for that business object.
- Do not query on fields of Siebel field data type DTYPE_NOTE.

To create a predefined query by saving a query

- 1 Navigate to the screen where you will run the query.

- 2** Click the Query button in the applet title bar or select New Query from the applet drop-down menu.
- 3** In the applet that is displayed, enter the criteria for the new query.
- 4** Click the Go button and then click Run Query.

The query's results appear.

- 5** From the application-level menu, choose Edit > Query > Save As.
- 6** In the Save Query As dialog box, enter a name for the query, and click OK.

The query is added to your list of predefined queries. This query is private, and only you can view it.

- 7** If you want to make the query public:
 - a** From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.
 - b** In the Predefined Queries list, deselect the Private field in the record for the query you just created.

To set up a predefined query in the Predefined Query view

- 1** From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.
- 2** In the Predefined Queries list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	This is the name that appears in the predefined query drop-down list.
Object	The object upon which the query is performed.

Field	Comments
Private	Marked if the query is available only to the person who created it. When you unmark a query to make it public, the other users must first exit the application and reenter before they can see the newly public query.
Query	The SQL code for the query. When you create a query for a field that is a multi-value group, you can use the EXISTS operator to query nonprimary child records.

Setting Up Currencies

You specify the currencies your company uses by:

- **Making Currencies Active.** If the application includes the currency definitions you need, you make these currencies active.
- **Defining Currencies.** If you need additional currencies whose definitions the application does not include, you must also define these currencies.

NOTE: If you use multiple currencies, you must also set up exchange rates before you import data that contains foreign currencies and before you use any of the Siebel currency features.

Making Currencies Active

The application includes more than 30 currency definitions. If your currency is one of these, you need only mark it as active.

To make currencies active

- 1** From the application-level menu, choose View > Site Map > Applications Administration > Currencies.
- 2** For any currency that you want to make active, click the Active column in the Currencies list.
- 3** Enter the Start Date and End Date in the More Info form, to specify the date when this currency becomes active and the date when it is no longer active. This step is optional.

Defining Currencies

If your company uses any currencies that the application does not include, you must define them and mark them as active.

If you modify the definition of currencies, you must reconnect to the application before the modification becomes visible in other screens or in clear cache. For more information about clear cache, see [“Clearing the Cache” on page 94](#).

You cannot delete a currency once you have defined it. If you no longer use it, you can mark it as inactive.

To define a currency

- 1 From the application-level menu, choose View > Site Map > Applications Administration > Currencies.
- 2 In the More Info form, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Code	A three-letter code for the currency.
Name	The name of the currency.
Issuing Country	The country that issues the currency.
Symbol	The symbol for the currency, such as \$.
Scale	The number of places after the decimal used for displaying currency in the interface. For example, U.S. Dollars has a scale of 2 to accommodate the cents, so an amount would be displayed as \$10.50. If the scale were 1, this same amount would be displayed as \$10.5.
Smallest Denomination	The smallest unit of currency available. For instance, the smallest unit of currency for the U.S. Dollar is one cent, or .01 dollars. If there were no cents, the scale would still be 2, but the smallest denomination would be \$0.05.
EMU Triangulation	Check to indicate that this currency must be converted to other checked currencies using the EMU Triangulation method.
Active	Indicates whether or not the currency can be chosen by the end user.
Start Date	The date when the currency becomes active.

Ongoing Application Administration Tasks

Setting Up Currencies

Field	Comments
End Date	The date when the currency is no longer active.
Extended Scale	The number of places after the decimal used for storing currency data in the database. If the values in the Extended Scale and Scale fields are different, results of currency calculations, for instance conversions or discounts, may be different than expected. This is because the currency values that are stored in the database are used for these calculations, rather than the displayed values.

Setting Up Currency Conversion

This section discusses how to set up exchange rates and includes related background information. It includes the following topics:

- **Setting Up Exchange Rates.** You must set up exchange rates used to convert currencies.
- **Understanding the Euro and Triangulation.** If a currency is part of the European Monetary Union, you convert it to other currencies through the Euro.
- **Currency Conversion Functionality.** The currency conversion rates that you set up are used by a number of features of Siebel applications.

Setting Up Exchange Rates

After you have set up your currencies, but before you use any currency features or import data with foreign currencies, you must set up exchange rates that are used to convert currencies.

If you fail to set up an exchange rate, currency will be converted on a 1:1 basis. This means that the amount stays the same but the currency symbol changes.

NOTE: To calculate exchanges between currencies, you must set up an exchange rate twice—one for each currency. For instance, if you want to calculate exchange rates between U.S. dollars and Japanese yen, you must set up an exchange rate for yen to dollars, and set up another rate for dollars to yen.

To set up exchange rates

- 1** From the application-level menu, choose View > Site Map > Applications Administration > Currencies.
- 2** In the Currencies list, select the currency for which you want to establish exchange rates.
- 3** Click the Exchange Rates view tab.

- 4** In the Exchange Rates list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Currently, Daily is the only type used.
To Currency	The currency to which you are converting the currency selected in the currencies list.
Exchange Rate	The conversion rate.
Exchange Date	<p>The date of this conversion rate. When converting currencies, Siebel applications use the exchange rate whose date is closest to, but not past, the date of the transaction. Depending on the accuracy that you need and on how much currency values are fluctuating, you may want to enter a new exchange rate every week, month, quarter, or year.</p> <p>Siebel applications use the Exchange Date only to convert currencies in transactions in which money has been or will be received. For example, Quote Item Price has an Exchange Date field, because it represents money that your company will receive, and your sales representatives should enter the date when the money will be received.</p>

Repeat this process to add additional exchange rates.

You must restart the Siebel client or use the clear cache command before any changes to exchange rates can be seen in your Siebel application. For more information about clearing the cache, see [“Clearing the Cache” on page 94](#).

The Euro and Triangulation

NOTE: As of January 2002, the Euro Triangulation method for converting between currencies belonging to EMU members is not needed for present and future currency exchanges. However, the method is still available in Siebel applications, as are the old currencies, so that historical data can be maintained accurately. The following description applies only to historical data needing conversion prior to the 2002 switchover to the Euro for the EMU member countries.

If a country is a member of the European Monetary Union (EMU), you should convert its currency to other currencies through the Euro. This is called triangulation, and it is used whenever either currency being converted has EMU Triangulation checked.

For example, if you are converting from USD to DEM and DEM has EMU Triangulation checked, you must set up the conversion rates between US dollars and the Euro and between the Euro and US dollars. You do not have to check the EMU Triangulation field for USD. The DEM will be converted to EUR according to the fixed exchange rate set by the European Monetary Union, and then the amount in EUR will be converted to USD according the exchange rate you set up.

The EMU Triangulation field is already checked for the following European Monetary Union member nations: Germany (DEM), Belgium (BEF), Spain (ESP), France (FRF), Ireland (IEP), Italy (ITL), Netherlands (NLG), Austria (ATS), Portugal (PTE), Finland (FIM), and Luxembourg (LUF). However, you can check or clear this field. For instance, if the United Kingdom or Sweden joins the EMU, then you can check the field for that currency.

To calculate triangulation conversion, the conversion rate is always expressed to six significant figures. Conversions from one national currency unit into another are made by:

- 1** Converting the monetary amount from the national currency unit into the Euro.
- 2** Rounding the result to not less than three decimal places.
- 3** Converting the result to the target national currency.
- 4** Rounding the result to the lowest subunit of the target national currency, such as pfennig for the German mark or centime for the French franc.

NOTE: The EMU Triangulation field should be checked only for currencies that are subdivisions of the Euro.

Currency Conversion Functionality

Currency conversions currently occur in your Siebel application in several features, including:

- **Price lists.** When you change the currency code of a price list, it will prompt you for an exchange date and convert the prices of all of the price list items.
- **Quotes.** When you change the currency code of a quote, it will convert the discount amounts and discount prices.
- **Forecasting.** When you update forecast information from the opportunity, it will do a currency conversion from the opportunity currency to the forecast currency if the currencies are different. When you roll up the forecast lines, it will do a conversion from the forecast line currency to the rollup forecast currency if the currencies are different.
- **Projects.** When you create expenses in a currency different from the project's currency and submit the expenses to the project, the expense amount will be converted from the expense currency to the project currency in the Project Time Expenses Summary and Project Time Expenses Adjustments views.
- **Rate lists.** When you change the currency code of a rate list, it will prompt you for an exchange date and convert the prices of all of the price list items.
- **Expense reports.** When you prepare expense reports, you can perform currency conversion between the expense currency and your default currency.
- **Reports.** The following reports support currency conversion:
 - **Opportunity Pipeline Report by Rep.** Opportunity revenues created in different currencies will be converted in the Total and Subtotal fields to the user's default currency.
 - **Euro Expense Report.** If expenses have been created in an EMU currency, all expenses will be displayed in dual currencies.
 - **Project Limit Summary Report.**
 - **Forecasting Reports.**
 - **Current Quotes Report.**

- **Charts.** The following charts support currency conversion:
 - **Opportunity Current Opportunity Analysis.** Opportunity revenue will be converted to the user's default currency if both the opportunity currency and the revenue currency are different from the user's default currency.
 - **Forecast Analysis.**

Setting Up Expense Types

When employees create expense reports, they choose an expense type for each line item in the report. For examples, when employees travel on business, they might have to enter line items with expense types *Food*, *Airfare*, *Car Rental*, *Hotel*, and so on.

When you set up expense types, you specify what expense types are available to employees in the drop-down list that they use to choose expense types. You also specify how these expense types will be categorized and summarized in expense reports.

You can also create establishments that are associated with these expense types. For example, if the expense type is *Airfare*, you might associate establishments with it such as *Air Canada* and *British Airways*. For more information about associating expense types with establishments, see *Siebel Professional Services Automation Guide, MidMarket Edition*.

NOTE: Before you can add expense types and establishments, you must add them in the List of Values Administration screen so that they can be displayed in the drop-down list. Add expense types under EXP_ITEM_TYPE, and add establishments under EXP_ITEM_ESTAB. When you add the expense types and establishments in the Expense Type screen, make sure they are identical to those in the List of Values Administration screen. For more details about List of Values administration, see [Chapter 4, “Working with Lists of Values.”](#)

To set up expense types

- 1 From the application-level menu, choose View > Site Map > Applications Administration > Expense Types.

- 2** In the Expense Types list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Expense Type	Enter the expense type that the employee will choose in the Expense Type drop-down list of expense report line items, such as Airfare.
Report Category	Enter a category for this expense type. This category will be used in summary reports, such as Air/Rail Fare.
Summary	Enter a larger summary category for this expense type, such as Travel Cost. This summary category will be used in summary reports.

Setting Up Payment Terms

Payment terms are the different terms that you offer to your customers, such as Net 30 days and Net 60 days. You set up payment terms so that they are available in your Siebel application, for example in the Quotes screen.

To set up a payment term

- 1 From the application-level menu, choose View > Site Map > Applications Administration > Payment Terms.
- 2 In the Payment Terms list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Payment Term	Enter a name for the payment term, such as Net 30.
Net Days	If the payment term requires payment in a specific number of days after the order date, enter the number of days. Optional
Description	Enter a description of the payment term. Optional.
Discount	If there is a discount for early payment, enter the amount of the discount. Optional.
Discount Days	If there is a discount for early payment, enter the number of days within which a customer must pay to qualify for the discount. Optional.
Due	If there is a specific due date for payment, enter the due date. Optional.
Integration ID	Users should not modify this system field. It is a cross-reference that links the Siebel application to corresponding payment term information in the back-office application.

Setting Up Periods

Periods are time periods that are used in your business, such as Q1 2002 or Jan 2001. Periods are used extensively in the Siebel application, such as in forecasting, time sheets, and expense reports.

Be sure to set up periods far enough into the future that forecasting will work. For example, the default forecast is for seven months ahead. Therefore, if you keep this default, you must create periods defined for at least seven months from the current date for forecasting to work correctly.

After setting up a period, you can associate Period Units with it. Period Units allow you to define one time unit in terms of another. For example, day periods can be associated with week periods for use in Timesheets. When a new timesheet is created, based on a week period, each day in that week is also added to the timesheet. This functionality requires the day periods to be associated as Period Units with the week period.

To set up periods

- 1 From the application-level menu, choose View > Site Map > Applications Administration > Periods.
- 2 In the Period Definition list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Period	Enter a name for the period, such as Q1 2001.
Closed	Select this to indicate that the period has already closed.
Start	Enter the start date for the period.
End	Enter the end date for the period.
Type	Select the type of period, such as month, quarter, or year.
Description	Enter a description of the period.

To associate period units with a period

- 1** From the application-level menu, choose View > Site Map > Applications Administration > Periods, and select the appropriate period.
- 2** In the Period Units list, click New.
- 3** In the Period Units dialog box, select all the period units to associate with this period, and then click OK.

Specifying Telephone Formats

Default telephone formats are specified in the List of Values view. You can only have one default telephone number format per country. The default format is applied when you enter only numbers, without slashes, dashes, or other formatting symbols.

Before users enter telephone numbers:

- Set the default country. See [“Setting Up Locales” on page 35](#). The default phone format is determined by the locale setting.
- Define formats for countries outside the default country. See [“Specifying Non-North American Telephone Formats” on page 62](#).

If a user enters a telephone number from a country for which the format has not yet been specified, the telephone number may be formatted incorrectly.

NOTE: If you define any new telephone formats, coordinate with communications administrators who specify CTI functionality and define dialing filters. For more information, see *Siebel Communications Server Administration Guide, MidMarket Edition*.

North American Telephone Formats

The default format for North American telephone numbers is (000) 000-0000. The telephone formatting logic for North American telephone numbers works as follows:

- If the user enters 10 digits in a telephone number field, it is formatted as (123) 123-1234.
- If the user enters more than 10 digits, the first 10 digits are formatted as (123) 123-1234, and the rest of the digits are used as the extension number. The user can enter up to 40 digits.
- If the user enters fewer than 10 digits, an error message appears.
- If the user begins the telephone number with a leading zero, an error message appears.

This telephone formatting logic is followed even when the default country is not in North America.

Specifying Non-North American Telephone Formats

If your users need to enter telephone numbers for countries outside North America, you must specify telephone number formats for those countries.

To specify non-North American telephone formats

- 1 Choose View > Site Map > Application Administration > List of Values.
- 2 Query the Type field for the entry PHONE_FORMAT to see existing telephone formats.
- 3 Add a new record and complete the necessary fields.

Some fields are described in the following table. For more field information, see [Chapter 4, “Working with Lists of Values.”](#)

Field	Comments
Display Value	Enter the format string.
Language-Independent Code	<p>Use the number zero (0) to represent required digits, the character # to represent optional digits, and other formatting characters to represent how the telephone number should appear. Do not include any alphanumeric characters other than 0.</p> <p>For example, to format an Australian phone number, which includes a two-digit area code and a six- or eight-digit number, use (00) 000# 000#.</p> <p>You do not need to include characters to represent the country code in the format. When a user enters a number, the country code is automatically shown if the default country is different from the country code.</p> <p>The maximum number of digits allowed in the format is 12. Any digits beyond 12 are used as the extension number. For example, even if the format is 000-000-0000-0000, 14 digits entered as 12345678901234 display as 123-456-7890-12x34.</p>

Field	Comments
Order	Enter the country code of the new format.
Type	Enter PHONE_FORMAT or choose it in the drop-down list.

- 4 Follow the instructions in [“Clearing the Cache” on page 94](#).

International Telephone Formats

To enter an international telephone number (a telephone number for a country other than the current default country) in a telephone field, the user must specify the country by preceding the telephone number with a plus sign (+) followed by the country code (for example, +44). If the user does not enter a country code, the default country code is assumed.

After the user indicates the country by entering the plus sign and country code, the telephone formatting logic for international telephone numbers works as follows:

- If the user enters exactly the same number of digits in a telephone number field as there are in the telephone format for the indicated country, the entry is formatted as specified.
- If the user enters more than the number of digits in the telephone format for the indicated country, the first digits are formatted as specified and the rest of the digits are used as an extension number. The user can enter up to 40 digits.
- If the user enters fewer than the number of digits in the telephone format for indicated country, the entry is accepted without an error message. (This is to accommodate telephone numbers of different lengths.)
- If there is no List of Values telephone format entry for the indicated country, the number is accepted, but not formatted. No error message is returned.

Unformatted Telephone Numbers

When you change or add a telephone number format, the existing telephone numbers are *not* updated automatically.

CAUTION: When entering telephone numbers, users can enter letters in place of digits, but computer telephony integration (CTI) features, such as outbound dialing, do not work for these numbers. Queries for such numbers must include the letters, not the numeric equivalents. Siebel eBusiness Applications do not detect or warn users if they enter Q or Z (letters that do not appear on all telephones).

Examples

Table 6 shows how telephone numbers would appear under various circumstances. In this example, the default country is the United States and the default format is the North American format, (000) 000-0000. Another format has been entered for England (country code 44): 00.000-000.

Table 6. Telephone Number Format Examples

User Enters	Number Is Formatted As
1234567890	(123) 456-7890
1234567890123	(123) 456-7890 x123
123456	Error message: "Invalid data has been entered."
+ 4412345678	+ 44 12.345-678
+ 441234567890	+ 44 12.345-678 x90
+ 4412345	+ 44 12345
+ 2512345	+ 2512345
?0 + 4412345678	?0 + 4412345678 (you see the '?' and the '0')
?0HelloWorld	?0HelloWorld (you see the '?' and the '0')

The telephone format has no effect on sort order.

When performing a query on a telephone number, do not include any format characters such as (,), -, ., x, or spaces.

You can query for only country 61 by typing `+ 61 *` but you cannot query for only North American telephone numbers this way, because `+ 1 *` returns all telephone numbers. To query for North American telephone numbers, use `not like (+) *` instead.

[Table 7](#) gives examples of how to query telephone numbers.

Table 7. Querying Telephone Numbers

Desired Query Result	Query Criteria
(123) 456-7890	1234567890
+ 61 (123) 45.67.89 x0	+ 611234567890 (if 61 is defined as a country code)
Country code 61 telephone numbers	+ 61 *
All telephone numbers	+ 1 *
415 area code numbers (North America only)	415*
Null telephone numbers	is null
415 area code or null (North America only)	415* or is null
(800) SKY-PAGE	800SKY*

When the user performs a query using a telephone number, the country code of the default country automatically prefixes the query (unless the default country is in North America, in which case no prefix is added). For example, if the default country is Germany, and the user types “0181” in the telephone field of a query, the German country code (+ 49) is added to the query (that is, `+ 49*0181 *`).

To find a number for a country other than the default country, the user must specify the country code in the query. To avoid limiting the query to one country, the user must refine the query and remove the country code portion of the query specification.

To see a demonstration of this behavior, look at the Contacts screen. Every number for a country other than the default contains a “+ n” at the beginning, while every number for the default country code appears as local (no +). Numbers that have the “+ n” require explicit queries (country code plus number) while local numbers are returned normally.

Importing Information with EIM

Siebel Enterprise Integration Manager (EIM) manages the exchange of data between Siebel database tables and other corporate databases. When you use EIM to import information that includes international telephone numbers, the numbers are handled as described in the previous sections.

For more information about EIM, see *Siebel Enterprise Integration Manager Administration Guide, MidMarket Edition*.

Setting Up Pager Companies

Pager companies can be set up so they are available from the File > Send > Page menu.

To set up a pager company

- 1 From the application-level menu, choose View > Site Map > Application Administration > Pager Companies.
- 2 In the Pager Companies list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comment
Name	Required.
Service Type	The choices in this drop-down list are One-Way and Two-Way.
Computer Paging Phone #	Required.

NOTE: The pager companies you use to send pages must support Telocator Alphanumeric Protocol (TAP), which is an industry standard for sending alphanumeric pages.

Date Formats

For the Siebel Web Client the display format for date and time is determined by the locale settings of the application server. For more information, see [“Setting Up Locales” on page 35](#).

For the Siebel Dedicated Web Client and the Siebel Mobile Web Client, the date format is determined by the specification in the client computer’s operating system.

When a user creates a query using a date field, the user must use the appropriate date format.

CAUTION: Siebel applications do not support date formats containing alphabetic versions of the month, so the format 19-Jul-1997 causes an error message whenever the system attempts to write a date value to the database.

Administering Global Time Zone Support

The time zones records that are shipped with Siebel applications as seed data include the 74 world time zones. These are the same time zones used by Microsoft in its operating systems. Use the Time Zone administration view to:

- Edit the text descriptions of time zones and their abbreviations
- Manage the active status of time zones to control which time zones are available to end users for use in the applications
- Manage multilingual translations to control how time zone information is displayed to users in multiple languages

Tasks for administering time zones include:

- [“Modifying Time Zones” on page 69](#)
- [“Maintaining Translations of Time Zones” on page 70](#)

For more information on global time zone support, see *Global Deployment Guide, MidMarket Edition*.

Modifying Time Zones

You will rarely need to modify a time zone’s regional settings. However, you may want to modify other time zone settings such as the display name or daylight savings rules, as these occasionally change.

To modify time zone settings

- 1 From the application-level menu, choose View > Site Map > Application Administration > Time Zone Administration.
- 2 In the Time Zone list, select the time zone record you want to modify.

3 Modify the fields as necessary.

Some fields are described in the following table.

Field	Description
Name	Name of time zone.
Standard Abbreviation	The abbreviation for the time zone.
UTC Offset	Offset, in minutes, from Coordinated Universal Time (UTC) when daylight savings is not in effect.
DST Abbreviation	The abbreviations for daylight savings time (DST).
DST Bias	Incremental DST offset, in minutes, from UTC when DST is not in effect.
DST Start Ordinal	Part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , <i>First</i> is defined in this field.
DST Start Day	Part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , <i>Sunday</i> is defined in this field.
DST Start Month	Part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , <i>April</i> is defined in this field.
DST Start Time	Start time for DST.

Maintaining Translations of Time Zones

You maintain translations of the text-based fields for each time zone using the Time Zone Administration view.

To maintain translations of time zones

- 1 From the application-level menu, choose View > Site Map > Application Administration > Time Zone Administration.
- 2 In the Time Zone list, select the time zone you want to translate.
- 3 In the Time Zone Translation list, add a record and complete the necessary fields, including the translation of the Name field for the selected language.

- 4 Repeat [Step 3](#) for each language required for translation.

Date and Time Stamps

The date and time used for time-stamping records are obtained by the Siebel Server. When a remote user runs the Siebel client in disconnected mode, the Siebel Server runs on the user's machine and takes the date and time from that machine.

If global time zone support is enabled, the server converts the date and time value to UTC.

Setting Up Email, Fax, and Mail Accounts (Contact Us)

Sales people use the Contact Us screen to answer questions and provide contact information to customers. If your organization uses Siebel eService, your customers can access this information directly from a Contact Us page on your Web site.

Creating a Contact Us Account

To help your sales people provide information on a chosen topic, you can create different accounts, such as Technical Support, Shipping, and Sales.

To add a Contact Us account

- 1 From the application-level menu, choose View > Site Map > Application Administration > Contact Us.
- 2 In the Email, Fax and Mail Accounts list, add a new record.
- 3 In the More Info form, complete the necessary fields.

Some fields are described in the following table.

Field	Description
Account	Required. The name of the account.
Account Type	Choose the Contact Us type.
Access List	Indicates which employees can view the Contact Us account.

Adding Email Addresses and Subjects

If your organization uses Siebel eService, any email addresses you include in Contact Us accounts appear on a Contact Us page on your Web site. You can create default email subjects that are added to the user's Subject line when the user sends email through your Web site.

For more information, see *Siebel eService Administration Guide, MidMarket Edition*.

Using Keyboard Accelerators

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

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

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

For example, keyboard accelerators are provided for the following commands:

- Record manipulation: New Record, Delete Record, Copy Record, Edit Record, Save Record, Undo Record
- Query management: New Query, Execute Query, Refine Query, Save Query As
- Record navigation: Next Record, Previous Record, Next Page, Previous Page

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

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

Extended Mode

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

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

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

- The line “ExtendedKeyboard = TRUE” must appear in the [SWE] section of the configuration file for the active application
- The user's browser must be able to accept and correctly interpret the ActiveX control used to capture key sequences
- Each client browser must accept the lightweight ActiveX control used to capture key sequences. Acceptance of the control may be *silent*, or it may require the user to explicitly accept the control depending on browser security settings. If current browser security settings prohibit downloading of ActiveX controls, the browser security settings will need to be modified to allow ActiveX controls.

Basic Mode

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

- Key sequences mapped natively by the current browser will take precedence over Siebel keyboard accelerators mapped to the same key sequences. For example, Ctrl + N in version 5.5 of Microsoft Internet Explorer will open a new browser window regardless of accelerator mappings for Ctrl + N in the Siebel applications.
- Basic mode keyboard accelerators cannot include special keys in their mapped key sequences. Special keys include, but are not limited to, function keys and arrow keys.

Keyboard enablement will be active in basic mode if either of the following is true:

- The line “ExtendedKeyboard = FALSE” appears in the [SWE] section of the configuration file for the active application.

- The current browser does not support extended mode keyboard enablement.

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

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

Setting Up Industries

You can set up and maintain industry information used throughout the application. The information in the Industries view populates the Industries drop-down list, which is found in a variety of screens and views, such as in the Accounts screen.

To add an industry

- 1** From the application-level menu, choose View > Site Map > Application Administration > Industries.
- 2** In the Industries list, add a new record.
- 3** Fill in the Industry, SIC Code, and Type fields.

NOTE: The Industry and SIC Code values must be unique. If you add a value that already exists, you will receive an error message.

Setting Up Languages

You can set up and maintain language information used throughout the application. The information in the Languages view populates the Language drop-down list, which is found in a variety of screens and views, such as in the SmartScripts screen.

For example, a sales representative for a German chemical manufacturing company could use a Danish SmartScript to make a sales call to a prospective customer in Copenhagen, and then make the same sales call using an Italian SmartScript when speaking to a prospective customer in Rome. In these cases, the Language field is used to identify the language into which each SmartScript has been translated.

To add a language

- 1** From the application-level menu, choose View > Site Map > Application Administration > Languages.
- 2** In the Languages list, add a new record.
- 3** Complete the Name and Code fields.

NOTE: The Name and Code values must be unique. If you add a value that already exists, you will receive an error message.

NOTE: Languages cannot be deleted because deleting languages may cause problems with mobile Web client synchronization. While the delete language command can be restored using Siebel Tools, this is strongly discouraged. Additionally, ask for assistance from Siebel Technical Services before modifying any language code.

About Case Sensitivity

By default, Siebel applications are case-sensitive. If you perform a query or search, there will be a match only if the search criteria you enter are capitalized in the same way the data is capitalized in the database.

If you do not want queries and searches to be case-sensitive, you can enable case insensitivity either for the entire application or for selected fields. Please note the following:

- Application-wide case-insensitive searching can affect performance if you use a large database. The larger the database is, the greater the effect on performance will be.
- Field-specific case insensitivity has less of an effect on performance. If application-wide case insensitivity slows performance, you should use field-specific case insensitivity.

This setting determines whether simple queries and searches, where the user just enters a criterion in the field, are case-sensitive.

Regardless of which setting you choose, users can use operators to force case-sensitive or case-insensitive searches.

To force a case-sensitive search, use the operator `=` followed by the criterion in quotation marks. For example, if the user enters the criterion `= 'Computer'`, the query will return only records that have “Computer” spelled with a capital C in the field.

To force a case-insensitive search, use the operator `~ LIKE`. For example, if the user enters the criterion `~ LIKE computer`, the query will return all records that have “computer” in the field, regardless of capitalization.

The user must also use `~ LIKE` to force case insensitivity in searches with complex criteria, regardless of the setting for case sensitivity.

NOTE: You should determine your requirements for case-insensitive searching and set the appropriate parameters for the application or individual field before users enter any data.

Enabling Application-Wide Case Insensitivity

Application-wide case sensitivity is controlled through the CaseInsensitive parameter of the named subsystem representing the datasource definition.

By default, each of these data source definitions has the following parameter setting:

```
CaseInsensitive = FALSE
```

To enable application-wide case insensitivity, you change this setting to TRUE.

NOTE: There may be a performance degradation when the CaseInsensitive parameter is set to TRUE. You may want to also change the InsensitivityFactor Parameter to minimize performance degradation. For more information, see [“Modifying the InsensitivityFactor Parameter” on page 82](#).

The CaseInsensitive parameter only affects which data is retrieved by queries. It does not affect the order in which data appears on the screen. The sort sequence is database-dependent, and independent of the CaseInsensitive parameter.

In addition, the content of SRF files is case-sensitive in most cases and is not affected by how this parameter is set in the application configuration file.

You change the CaseInsensitive parameter in different ways, depending on whether you are working with Siebel Web Client or Siebel Dedicated Web Client.

Enabling Application-Wide Case Insensitivity for Siebel Web Client

For Siebel Web Client, you make changes to the CaseInsensitive parameter in the Server Administration screen.

To enable application-wide case insensitivity for Siebel Web Client

- 1 From the application - level menu, choose View > Site Map > Server Administration > Enterprise Configuration.
- 2 Click the Enterprise Profile Configuration view tab.

- 3** In the Component Profiles list, select the Named Subsystem Alias for the data source.
- 4** In the Enterprise Profile Configuration list, change the value of the `DSCaseInsensitiveFlg` to `True`.
- 5** Optionally, change the `InsensitivityFactor` Parameter as well, to control performance degradation.
- 6** Stop and restart the Siebel Server.

For more information, see [“Modifying the InsensitivityFactor Parameter” on page 82](#).

Enabling Application-Wide Case Insensitivity for Siebel Dedicated Web Client

For Siebel Dedicated Web Client, application-wide case sensitivity is controlled through the `CaseInsensitive` parameter in the configuration file for your application.

The configuration file for each Siebel application has a section for each one of the potential data sources for the application. By default, each of these data source sections has the following line:

```
CaseInsensitive = FALSE
```

To enable application-wide case insensitivity for Siebel Dedicated Web Client

- 1** Use any text editor to open your application configuration (.cfg) file.
- 2** Change the `CaseInsensitive` parameter to

```
CaseInsensitive = TRUE
```
- 3** Optionally, change the `InsensitivityFactor` parameter to control performance degradation.

The `InsensitivityFactor` parameter follows the `CaseInsensitive` parameter in each application configuration file. For more information, see [“Modifying the InsensitivityFactor Parameter” on page 82](#).

Modifying the InsensitivityFactor Parameter

When you change the CaseInsensitive parameter, you may also want to change the InsensitivityFactor parameter to minimize performance degradation.

The default setting for the InsensitivityFactor parameter is 2.

NOTE: Do not change the default value of InsensitivityFactor for Gateway Datasource (GatewayDataSrc). Gateway Datasource does not go against a database. Changing the value may cause problems.

You may want to test a number of values for this parameter with your database, spool the SQL to see the effect of different settings on response time, and then choose a value that meets your needs.

Enabling Field-Specific Case Insensitivity

You can also make individual fields case-insensitive. If you are concerned about performance, it is better to make a few fields case-insensitive than to enable application-wide case insensitivity.

You control field-specific case insensitivity with the Use Default Sensitivity property. This property determines whether the field uses the default property specified by CaseInsensitive parameter in the .cfg file, described previously. [Table 8](#) illustrates the relationship between the application-wide CaseInsensitive parameter and the field-specific Use Default Sensitivity property.

Table 8. Case Sensitivity Behavior

Use Default Sensitivity =	CaseInsensitive = TRUE	CaseInsensitive = FALSE
TRUE	Field is case insensitive	Field is case sensitive
FALSE	Field is case sensitive	Field is case insensitive

To enable case insensitivity for individual fields

- 1 Leave the CaseInsensitive parameter set to FALSE in the application configuration file.
- 2 In Siebel Tools, navigate to the Business Component/Field screen.
- 3 For each field you want to be case-insensitive, set the Use Default Sensitivity property in the field object to FALSE for the Field level Object Type.

You can also force the case of data in a field to be UPPER (all uppercase), LOWER (all lowercase), FIRSTUPPER (first letter of each word is uppercase, or NONE (unchanged).

- 4 After doing this for all of the fields you want to control, recompile your .srf file.
- 5 Replace the .srf file in your Siebel Server installation.

Adding Web Browser Capabilities

Siebel applications come with a number of browsers configured for use. Generally, you will not need to make changes to the Web browser settings. However, if you need to add a capability to a browser, you can do so through the Web Browser Administration screen.

Web browser capabilities identify what an end user's browser can and cannot do. They support the Siebel Web Engine's ability to provide different HTML tags and other markup tags to different browsers, based on what each particular browser is capable of rendering. This can also allow an administrator or developer to specify what looks best in a particular browser.

When a user logs into a Siebel Web application, the Siebel Web Engine reads information encapsulated in the requests coming from the user's browser to determine the browser's version and make. It then correlates that information with the data contained in the Web Browser Administration views to determine the browser's capabilities.

One of the primary ways this information is applied is through conditional tags in Web templates. For example, if some of your users use an older browser that does not support frames, your template might include a conditional tag that prevents these users from receiving pages with frames. Conditional Web engine tags that evaluate browser capabilities can be used in all Siebel Web templates and Web applications, but are used most prominently in those that support wireless devices. For example, the SWLSDetailApplet.swt template includes the following conditional tag:

```
<swe:switch>

<swe:case condition="Web Engine User Agent, TestCapability,
DefaultMarkup:XML'">

<swe:xsl-stylesheet name="SWLSDetailApplet.xsl" mode="process"/>

</swe:case>
```

By the time that the Web Engine interprets the `swe:case` tag, it has already determined what type of browser the user has. The usage of the tag causes the Web Engine to call the “TestCapability” method on the “Web Engine User Agent” business service. The “TestCapability” method will return TRUE if the user’s browser has a Capability called “DefaultMarkup” with a value of “XML.” When the condition is met (that is, the method returns TRUE) the tags between `< swe:case >` and `< /swe:case >` are processed. In this example the Web engine is instructed to use a particular XSL style sheet. For more information about the syntax of conditional tags, see *Siebel Tools Reference, MidMarket Edition*.

Adding Additional Capabilities

Siebel applications come with a number of predefined capabilities. These capabilities can be added to any browser. Some examples include:

- **FrameSupport.** Indicates whether the browser can render frame tags (for example, `< swe:frameset >`).
- **CookiesAllowed.** Indicates whether the browser supports cookies.
- **HighInteract.** Indicates whether the browser is among those supported for Siebel's High Interactivity Web applications (such as Internet Explorer 5.5).
- **ActiveX.** Indicates whether the browser can support ActiveX controls.

You can also add other capabilities that are not included in the standard Siebel application. For example, you could add a capability named *SupportsWingDingFont*. New capabilities then become available for use in any browser definition.

To add a capability

- 1 From the application-level menu, choose View > Site Map > Web Browser Administration > Capabilities.
- 2 In the Capabilities list, add a new record.
- 3 Complete a name and description for the new capability.

Adding Additional Web Browsers

If you need to add a Web browser definition that is not included in the standard Siebel application, you can choose between the following two methods.

- Add a parent browser definition. This definition includes all of the browser capabilities. Use this method if you need to add a completely new browser (such as Opera), or a major upgrade release of an existing browser (such as future releases of Microsoft Internet Explorer or Netscape). For information about this procedure, see [“To add a parent Web browser” on page 87](#).
- Add a child browser definition. Child browser definitions inherit the capabilities of the parent browser, and add additional capabilities as necessary. Use this method for adding interim releases based on a browser that is already defined. For example, a “dot” release, such as 5.7 or 5.8. For information about this procedure, see [“To add a child Web browser” on page 88](#).

Required Browser Capabilities

For a browser to work correctly, it must include two capabilities that allow the browser to be identified at runtime. The required capabilities are:

- **User-Agent.** This capability names the browser.
- **Accept.** This capability indicates what types of documents the browser can open.

These capabilities are part of HTTP standard information and appear in HTTP request headers sent from a browser. For example, a request from a Microsoft Internet Explorer 5.5 browser sent to a Web application might include the following lines:

```
Accept: image/gif, image/x-xbitmap, image/jpeg, image/pjpeg,  
application/vnd.ms-powerpoint, application/vnd.ms-excel,  
application/msword, */*
```

```
User-Agent: Mozilla/4.0 (compatible; MSIE 5.5; Windows NT 4.0)
```

In this example, the value for the User-Agent capability would be Mozilla/4.0 (compatible; MSIE 5.5; Windows NT 4.0).

Both the User-Agent and Accept capabilities must be included. This is because at runtime, the User-Agent is checked to identify the browser. If the User-Agent is not recognized, the values for the Accept parameter in the header will be compared to the Accept parameters of the browsers listed in the Web Browser Administration screen, to find the browser with the most closely matching Accept parameters.

In addition to the User-Agent and Accept capabilities, if a browser is based on an existing parent browser, it must include the Parent capability.

NOTE: Parent browsers frequently do not have the User-Agent and Accept capabilities. This is because parent browsers are intended to serve as containers of other capabilities that can be inherited. If a browser does not have its own User Agent and Accept capabilities, then it is acting as a parent of another browser that has these capabilities.

Adding a Web Browser

Whether you are adding a parent browser or a child browser, the process is similar. However, in the case of a parent browser, you add all detailed components, and in the case of a child browser, you base the browser on an existing browser.

NOTE: Although a parent browser may contain the User-Agent and Accept capabilities, it does not have to. If you use parent browsers as templates for child browsers, do not include these two capabilities in the parent browser template.

To add a parent Web browser

- 1** From the application-level menu, choose View > Site Map > Web Browser Administration > Browsers.
- 2** In the Browser list, add a new record.
- 3** Complete a name and description for the new browser.
- 4** Click the Capabilities view tab.

- 5** In the Capabilities list, add records for each of the capabilities for this browser.

NOTE: If there is an existing browser that contains most of the appropriate capabilities, you can copy it and then make changes. To do so, in [Step 2](#), click the menu button and choose Copy Record instead of New Record.

To add a child Web browser

- 1** From the application-level menu, choose View > Site Map > Web Browser Administration > Browsers.
- 2** Scroll through the list of browsers and identify the parent browser (that is, the one on which you will base the new browser).
- 3** Add a new record.
- 4** Complete a name and description for the new browser.
- 5** Click the Capabilities view tab.
- 6** In the Capabilities list, add these three records:
 - **Parent.** Set the capability value to the parent browser you identified in [Step 2](#).
 - **User-Agent.** Enter the appropriate User-Agent.
 - **Accept.** Enter the types of documents that can be opened by the browser.
- 7** Add any additional capabilities that are not included in the parent browser.

This chapter provides guidelines to administrators for working with lists of values within Siebel applications.

A list of values (LOV) is a set of values that populates a *static pick list*, which is accessed when a user clicks a drop-down list in the user interface.

Drop-down lists can be based on two types of pick lists: static pick lists and dynamic pick lists.

- A static pick list has a selection list that is a static list of values. An example of a static pick list is a drop-down list containing postal abbreviations for states and countries.
- A dynamic pick list has a selection list that usually contains transactional data. An example of a dynamic pick list is a drop-down list containing account names.

As a rule of thumb, dynamic pick lists include all pick lists that do not retrieve values stored in the S_LST_OF_VAL table. Dynamic pick lists are typically rendered through a pick applet, such as the pick list used to choose an account for a contact. However, they can be configured to appear as a drop-down list.

The remainder of this section focuses on static pick lists, whose contents can be administered from the List of Values views. For information on how to set up a new list of values and configure both static and dynamic pick lists, see *Siebel Tools Reference, MidMarket Edition*.

This section describes how to work with the values that populate static pick lists, including how to add or modify values in an existing list of values, and inactivate values when you do not want them to display. In addition, it describes how lists of values can be constrained by selections in other lists.

NOTE: If you will be creating multilingual lists of values (MLOV), you should also review *Siebel Tools Reference, MidMarket Edition*.

There are two screens in which you can view list-of-values data:

- In a list view in the Application Administration screen, List of Values view
- In an explorer view in the Application Administration screen, List of Values Explorer view

The values in these two views are the same. Only the format in which the information is presented is different. The procedures in this section give instructions that specify using the list view. If you prefer to use the explorer view, you may do so.

Your Siebel applications come with numerous lists of values that support the static pick lists used throughout Siebel screens. You can use these as they are, or you can modify them through the List of Values screen to support your organization's requirements.

Adding a New Value to an Existing List of Values

In order to add an item to an existing list of values so that it shows up in a drop-down list, you must know its type. You can find out the type by querying the List of Values list to determine the type associated with a specific display value. Then you can add a new record with that type. For instance, in the Accounts list you can see the Status drop-down list. Imagine that you use this field to indicate ratings for your accounts' reliability. Initial settings are Gold and Silver. You might want to add another status of Bronze to this list, to give to customers that have a reliable account rating. The procedure below uses this example.

To identify the list-of-values type for a display value

- 1 Navigate to the screen displaying the drop-down list to which you want to add a value (for example, the Accounts screen).
- 2 Select the drop-down list and make note of one of the choices.

For example, in the Accounts screen, select the Status drop-down list and make note of the value *Gold*.

TIP: Be sure to note the capitalization and spacing of the choice.

- 3 From the application-level menu, choose View > Site Map > Application Administration > List of Values.
- 4 In the List of Values list, perform a query in the Display Value field, using the value you noted in [Step 2](#).
- 5 In the list of records that is returned, identify the appropriate record by reviewing the entries in the Type field.

List-of-values types usually have names that relate to the field labels in the screens where they are used. In this example, you would look for a type labeled something like ACCOUNT_STATUS.

When you create a new value for this list, you will use this type.

To add a new value to an existing list of values

- 1** From the application-level menu, choose View > Site Map > Application Administration > List of Values.
- 2** Click New to create a new record, and then enter the list-of-values type in the Type field.
- 3** Enter a new value in the Display Value field.

For example, if Bronze is the status that your organization gives customers that have a reliable account rating, and you want to make Bronze available as in the Account Status drop-down, you would add a new record with ACCOUNT_STATUS as the type and Bronze as the display value.

Make sure that the length of the Display Value you enter does not exceed the allowed length of the destination column.

- 4** Enter a value in the Language Independent Code field. This value is usually the same as the Display Value.

Make sure that the length of the Language Independent Code you enter does not exceed the allowed length of the destination column.

NOTE: The Display Name and Language Independent Code must both be unique within a list-of-values type, except when configuring a multilingual list of values. If you add a value that already exists, you will get an error message. For example, there cannot be two ACCOUNT_STATUS records that have a display value of Bronze. For information about how this differs for multilingual lists of values, see the definition of the Language Independent Code field in [Table 9 on page 95](#).

- 5** If applicable, in the Order field, you can enter a number to indicate the numerical order in which the value appears in a drop-down list.

For example, if the order numbers for Gold and Silver are 1 and 2, respectively, the order number for Bronze would be 3.

- 6** If appropriate, fill in the remaining fields in the record.

For a description of these fields, see [“List of Values Fields” on page 95](#).

- 7** Clear the LOV cache by clicking the menu button and then choosing Clear LOV Cache.

After you have cleared the cache, you can navigate to a screen and select the new value in the related drop-down list. For example, you can navigate to the Accounts screen, select a record from the Accounts list, and then choose Bronze in the record's Account Status drop-down list.

Clearing the Cache

A particular list of values is cached the first time a user opens a drop-down list that uses the list of values. This improves performance by avoiding the need to retrieve the list from the database upon subsequent usage of the drop-down list. However, this also means that updates to a list of values will not show up in a drop-down list until you clear the cache. Clearing the cache instructs the Siebel application to read the updated values out of the database and display them.

Users who log in after you add or change a list of values can see the addition or change that you made. However, in order for you to see the changes that you made in real time, you must do one of the following:

- For the Dedicated Web Client, log out of the application and log back in.
- For either the Web Client or the Dedicated Web Client, clear the cache.

To clear the cache

- 1** From the application-level menu, choose View > Site Map > Application Administration > List of Values.
- 2** In the List of Values list, click Clear Cache.

List of Values Fields

List-of-values records have the fields shown in [Table 9](#). Not all fields for list-of-values records are displayed in the standard user interface. You can use the Columns Displayed menu option to see a field that is not displayed.

Some list-of-values fields, such as High, Low, and Weighting Factor, are for use by specialized Siebel C++ code to store additional information about the selected list of values record. In addition, pick maps can use list-of-value fields such as High, Low, and Weighting Factor. Pick maps normally use the Display Value field, which causes the list item selected by the user to be stored in the database exactly as it appears in the list. These fields can be used to populate other fields of the business component in which the pick map is defined.

If you need to use the High or Low fields, or other extra fields, use Siebel Tools to extend the PickList Generic BusComp by adding fields mapped to the corresponding columns on the S_LST_OF_VAL table. For example, you could use the High and Low fields to automatically fill in the high and low temperatures when a user picks a Month value in a Date drop-down list. To do so, you would add two pick maps to the Month field by adding the High and Low list of value fields to the Pick List field of Pick Map. For more information about the PickList Generic BusComp, and about configuring static pick lists and pick maps, see *Siebel Tools Reference, MidMarket Edition*.

NOTE: The Target High and Target Low fields are used exclusively with Smart Reports. For more information, see *Siebel Reports Administration Guide, MidMarket Edition*.

Table 9. List of Values Fields

Field	Description
Type	The type of list of values (the field name).
Display Value	Value as displayed in the drop-down list.
Translate	When checked, indicates that internationalization is needed. (There is no client or server functionality associated with this field; for more information, see <i>Siebel Tools Reference</i> .)

Table 9. List of Values Fields

Field	Description
Multilingual	When checked, indicates that the list of values is part of a multilingual list of values (MLOV). (There is no client or server functionality associated with this field; for more information, see <i>Siebel Tools Reference</i> .)
Language Independent Code (LIC)	<p>Along with the Display Value, the Language Independent Code uniquely identifies a value for a particular LOV type. In most cases the Language Independent Code is the same as the Display Value. However, the Language Independent Code and Display Value are different for multilingual lists of values (MLOVs). MLOVs allow a single logical list item to support multiple display values for users who are accessing the Siebel application in different languages.</p> <p>For example if the MR_MS (Personal Title) list of values were multilingual, there might be three list of values items with a Language Independent Code of Mr. These might have a display value and language of Mr. (English-American), Senior (Spanish - Modern), and Herr (German), respectively. German users would see Herr in the Personal Title drop-down list, Spanish users would see Senior and English users would see Mr. Although the display values vary across language instances, the value stored in the database when a user selects any one of these will always be Mr. since that is the Language Independent Code associated with Herr, Senior, and Mr.</p> <p>For more information on configuring multilingual lists of values, see <i>Siebel Tools Reference, MidMarket Edition</i>.</p> <p>Values entered in the Language Independent Code field are sometimes referred to as LIVs (language independent values.)</p>
Parent LIC (Language Independent Code)	<p>The Language Independent Code of a parent list of values. Used in hierarchical lists of values, where the values that will display in a drop-down list are constrained by the value selected in the parent drop-down list of values. For more information, see “Constrained Lists of Values” on page 101.</p> <p>There are only parents and children in this hierarchy. Grandchildren are not allowed. This is enforced by limiting the values in the Pick Parent dialog box to those values which do not themselves have parent display values.</p>
Replication Level	Specifies whether the translation is intended for use at all levels in the translation hierarchy or only at the regional level.

Table 9. List of Values Fields

Field	Description
High	Extra field available for use by pick maps or for customization.
Low	Extra field available for use by pick maps or for customization.
Order	The numerical order in which a value is displayed within a drop-down list.
Active	When checked, indicates that the value is displayed to the end user. When unchecked, indicates that the value is not displayed to the end user.
Language Name	Language used for the list of values Display Value field.
Target Low	Extra field used in Smart Reports. For more information, see <i>Siebel Reports Administration Guide, MidMarket Edition</i> .
Target High	Extra field used in Smart Reports. For more information, see <i>Siebel Reports Administration Guide, MidMarket Edition</i> .
Weighting Factor	Extra field available for use by pick maps or for customization.
Bitmap	Bitmap file that is displayed.
Description	Description of a specific value.

Modifying a List of Values

CAUTION: Use caution when modifying lists of values that are part of the seed data. Modifying some list of values fields that are used programmatically by the Siebel application can adversely impact standard Siebel functionality. However, you can modify the Display Value field without affecting standard Siebel functionality both when the list is a multilingual list of values (MLOV) and when it is a standard list of values.

Modifying some lists of values can adversely impact standard Siebel functionality:

- Do not change the Language Independent Code values for lists of values because the internal Siebel application uses the Language Independent Code field.
- Some lists of values are for use only by the internal Siebel application and should not be modified. For example, the List of Values SOURCE_TYPE (Internal) and list-of-values types that include REPOSITORY in the Type field name are for internal use only.
- Some list of values modifications can have undesired results. For example, changing all lists of values in the application to uppercase or changing the Language Independent Code from the Siebel standard can result in values not being displayed or being displayed improperly.

NOTE: Modifying a Display Value field does not automatically update records that have been populated with the old value. For example, if you change *Ms.* to *Miz* in the Display Value field, *Miz* will show up in the drop-down list, but all contact records that were previously entered with *Ms.* in the Personal Title field will still have *Ms.* in the Personal Title field.

For more information about multilingual lists of values (MLOVs), see *Siebel Tools Reference, MidMarket Edition*.

In order to modify a value in a drop-down list, you must know its display value and type. You can find out the type by querying the List of Values list for a specific display value. For example, if you needed to make a change to the value *1-ASAP* in the Priority drop-down list in the Activities screen, you could do so using the following steps.

To modify an item in a list of values

- 1** From the application-level menu, choose View > Site Map > Application Administration > List of Values.
- 2** Click the menu button, and then choose New Query.
- 3** Enter the Display Value for the record you want to change in the Display Value field.

For example, you might enter the value *1-ASAP*.

- 4** Click the menu button, and then choose Run Query.

A list of records appears that includes the display value that you entered. More than one record may appear, and the records may have different types.

- 5** In the list of records, select the record that you want to modify, and make the desired change.
- 6** To see the list of values modification in the application, clear the cache. For instructions about how to clear the cache, see [“To clear the cache” on page 94](#).

Inactivating a Value in a List of Values

You can inactivate individual values in a list, but you cannot delete values. Inactive values are values that the application does not display to end users in a drop-down list, whereas active values are displayed to end users.

CAUTION: Inactivating some lists of values can adversely impact standard Siebel functionality.

Do not inactivate list-of-values types or values used internally by the Siebel application. For example, do not inactivate list-of-values types that include “Repository” in the Type field name.

Be careful when inactivating a list of values, because the application may depend on the list of values being present.

Be careful when inactivating individual values as well. For example, if you inactivate the value Commercial in the Account_Type list of values, but you have existing or old account data that stored Account Type = Commercial, you may introduce inconsistencies in your data. If you want to inactivate a display value, you need to clean up the account records in the database first.

To inactivate a value in a list of values

- 1 From the application-level menu, choose View > Site Map > Application Administration > List of Values.
- 2 If necessary, perform a query to locate the record you want to make inactive.
- 3 Select the list of values record you want to make inactive.
- 4 In the Active field, click the check mark. When a square containing an x appears, click the x.

The x disappears and the Active field no longer contains a check mark.
- 5 To see that the value has been inactivated, click the menu button and then click Clear LOV Cache.

Constrained Lists of Values

Some drop-down lists are set up to display a subset of values based on a value set in another drop-down list. For example, if you have two fields for Service Request, *Area* and *Subarea*, the values shown in the *Area* drop-down list might include *Network* and *Upgrade*. If the user chooses *Network*, that user might see a drop-down list for *Subarea* that includes *Ethernet Card* and *3rd Party Software*. If on the other hand the user chooses *Upgrade* for the *Area*, that user might see *CD-ROM*, *Disk Drive*, *Memory*, and *Operating System* in the *Subarea*. Setting up this type of filtering is referred to as setting up a *constrained pick list*. In such a case, the lists of values have been configured to be dependent on one another. In this example, the *Area* drop-down list is considered to be the parent and the *Subarea* drop-down list is the child.

Figure 1 shows the values available in the *Area* drop-down list, and the values available in the *Subarea* list when *Network* and *Upgrade* have been selected, respectively.

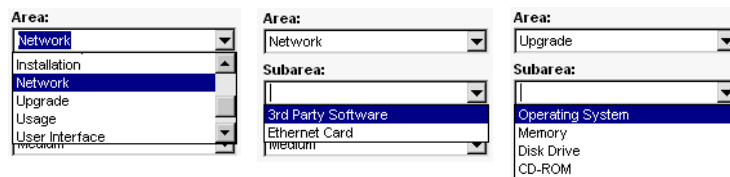


Figure 1. Contents of Drop-Down List Constrained by Parent Drop-Down List

Constrained pick lists (or lists of values) must first be set up through Siebel Tools. After they are configured through Siebel Tools, specific values in lists can be made hierarchically dependent through the List of Values screen. This is accomplished by using the Parent LIC attribute in the list of values record to specify which values will show up when a value is selected in the parent drop-down list.

For example, the LOV Type SR_AREA is used by both the Area and Subarea drop-down lists in a Service Request. The values that show up in the Area drop-down list are constrained to those that have a Parent LIC value of External. [Figure 2](#) shows how the records for these values appear in the List of Values list, including the Parent LIC value of External.

LOV:

List of Values					
New Query 1 - 11 of 11 Query Results					
Type	Display Value	Language Indepe	Language Name	Parent LIC	Order
SR_AREA	CTI Hardware	CTI Hardware	English-American	External	
SR_AREA	Configuration	Configuration	English-American	External	
SR_AREA	Solution Search	Solution Search	English-American	External	
SR_AREA	eMail Response	eMail Response	English-American	External	
SR_AREA	Smart Scripts	Smart Scripts	English-American	External	2
SR_AREA	Installation	Installation	English-American	External	3
SR_AREA	Network	Network	English-American	External	4
SR_AREA	Upgrade	Upgrade	English-American	External	5
SR_AREA	Usage	Usage	English-American	External	6
SR_AREA	User Interface	User Interface	English-American	External	7
SR_AREA	Internet Registration Request	Internet Registration	English-American	External	8

Figure 2. LOV Records with the Same Parent LIC

The values that show up in the Subarea drop-down list are constrained to those that have a Parent LIC value that matches the user's selection for the Area. For example, if the user selects *Network* in the Area drop-down, only those values that have the Parent LIC set to *Network* show up in the Subarea drop-down list, while if the user selects *Upgrade* in the Area drop-down, only those values that have the Parent LIC set to *Upgrade* will show in the Subarea drop-down list. Figure 3 shows the records for the values that are available for both the Network and Upgrade parent values.

LOV:

List of Values						
Type	Display Value	Language Indepe	Language Name	Parent LIC	Order	Ac
SR_AREA	CD-ROM	CD-ROM	English-American	Upgrade	5	✓
SR_AREA	Disk Drive	Disk Drive	English-American	Upgrade	5	✓
SR_AREA	Operating System	Operating System	English-American	Upgrade	5	✓
SR_AREA	Memory	Memory	English-American	Upgrade	5	✓
SR_AREA	Ethernet Card	Ethernet Card	English-American	Network	5	✓
SR_AREA	3rd Party Software	3rd Party Software	English-American	Network	5	✓

Figure 3. LOV Records Constrained by the Values Upgrade and Network

If you needed to change the parent Area to which a Subarea list item belongs, you would modify the Parent LIC code of the Subarea list item. Similarly, to add a new Subarea list item, you would add a new record, setting the list-of-values type to SR_AREA and the Display Value, Language Independent Code, and Language as described in [“Adding a New Value to an Existing List of Values” on page 91](#). Then you would set the Parent LIC code to the appropriate parent area. By contrast, to add a new item to the Area drop-down list, you would follow the same steps, but specify that the Parent LIC code have the value *External*.

NOTE: The usage of the value *External* to identify items in the parent drop-down list is specific to this example. To determine what this value would be for any given pair of constrained pick lists, reference the underlying configuration in the Tools Repository.

For information about constraining both static pick lists (maintained through lists of values) and dynamic pick lists, see *Siebel Tools Reference, MidMarket Edition*.

NOTE: In the example above using the Area and Subarea drop-down lists, both parent and child lists of values have the same list-of-values type. While this is not required, it has the advantage of avoiding EIM unique key violation errors. These errors can occur when constraining pick lists using Siebel Tools, when the parent and child lists of values contain different list-of-values types. If you plan to use Siebel EIM to exchange list of values data, you should consider constraining pick lists by configuring them so that the parent and child lists of values have the same list-of-values type.

Audit Trail creates a history of the changes that have been made to service requests, campaigns, orders opportunities, and product defects. An audit trail is a record showing who has accessed an item, which operation was performed, when it was performed, and how the value was changed. Therefore, it is useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record keeping. Audit Trail logs information without requiring any interaction with, or input from, your users.

For example, by using Audit Trail, you can track which employee modified a certain field and what data has been changed. A call center user can track the status change of a service request or calculate the time it takes to solve it.

Audit Trail works for every Siebel Web deployment and configuration option, including synchronization. For Siebel Remote users making changes to records, Audit Trail records successfully committed transactions and also transactions that did not get synchronized to the server because of conflicts.

In Siebel MidMarket Edition, the Siebel Web Client supports the *database auditing* mode for Audit Trail. In this mode, the audit trail is written directly into the database, supporting both remote users and replicated databases. Changes to an audit trail field are cached in the application. Exiting from the Siebel application and restarting it writes all cached changes to the database. Alternatively, when the cache size is reached, all cached entries are automatically written to the database even without exiting from the application.

Audit Trail Features

The following features of Audit Trail are described:

- [Audit Trail Content](#)
- [Audit Trail for Siebel Remote Users](#)
- [Audit Trail Engine Business Service on page 107](#)

Audit Trail Content

Audit Trail records the following information:

- Field
- Row ID of the record being changed
- Operation being performed (Update/New/Delete/Copy)
- Original value
- Changed value
- User ID performing the operation
- Date and time the operation was performed

Audit Trail for Siebel Remote Users

The following information applies to remote users:

- Disconnected users can use Audit Trail as well as connected users. Audit Trail will stamp transactions with local machine time.
- Remote users should not use file auditing mode, only database auditing mode. Siebel MidMarket Edition supports database auditing only.
- Audit trails are synchronized along with other data.
- If the transaction is rejected during the conflict resolution, the corresponding audit trail record is not discarded.

Audit Trail Engine Business Service

The Audit Trail Engine business service is located in the Object Manager and stays active as long as the Object Manager is active. The purpose of the Audit Trail Engine business service is to capture changes (updates and deletes) to records and to store them in the designated format (database or Siebel file system, according to the audit trail mode selected). For the various data operations, if the auditing condition is met, the business component being audited triggers the Audit Trail Engine business service.

The methods listed in [Table 10](#) are associated with the Audit Trail Engine business service. The Start, Stop, and ImportAll methods are accessible to an administrator and allow the performance of certain tasks.

Table 10. Exposed Methods in the Audit Trail Engine Business Service

Method	Mode	Internal Use Only	Description
Start	Both		Starts the Audit Trail Engine.
Stop	Both		Stops the Audit Trail Engine.
ImportAll	File only		Imports all the associated Audit Trail Item business component records.
AddTrailEntry	Both	X	For the person specified, adds an audit trail entry to the pertinent data structure (unsaved audit list).
CommitTrail	Both	X	Removes the uncommitted elements from the unsaved list and puts them on the saved list, and writes to the database or file if the cache size has been reached.
CrashRecover	File only	X	Saves file from local system to the Siebel file system.
Kill Unsaved Trail	Both	X	Kills the unsaved audit trail; this happens on an UndoRecord.

The easiest way to use these methods is through a workflow process. If you want to stop or restart the Audit Trail Engine, create a new workflow process or reuse an existing one, and then create a business service node that implements the Stop method or the Start method. For more information about workflow processes, see *Siebel Business Process Designer Administration Guide*.

Configuring Audit Trail in Siebel Tools

In the preconfigured Siebel application, the Audit Trail functionality is disabled. By enabling the Audit Trail business service within Siebel Tools, Audit Trail is enabled for all application objects. However, you can turn off Audit Trail for individual applications by inactivating the Audit Trail application event service for that application's object. For custom application objects, you must add an Audit Trail application event service to the application object in order to use Audit Trail.

NOTE: Audit Trail does not create history records for predefault values; predefault values are assumed to be part of the initial record.

To enable the Audit Trail Engine business service

- 1** Launch Siebel Tools.
- 2** In the Object Explorer, select the Business Service object, and then select the Business Service User Prop object.
- 3** Select Audit Trail Engine in the Business Services object list.

- 4** Configure the Business Service User Properties to use the following values:

Name Field	Value Field	Description
Audit Source	TABLE	Can be TABLE or FILE. Signifies the database or file auditing mode in which you are going to run Audit Trail. Siebel MidMarket supports TABLE (database auditing mode) only.
Cache Entries Size	1	The number of records to cache before writing the audit trail records for the selected mode. For example, if this field is set to 10 and Audit Source is running in FILE mode, then after the user makes 10 audited changes for a particular business component, the Audit Trail engine creates one file in the Siebel file system. When running in TABLE mode, you should use the default value of 1 because there is no performance gain from increasing this value.
Enable	TRUE	Can be TRUE or FALSE. Determines the current state of the Audit Trail.

NOTE: Audit Trail data is cached by the business service and only written out when the number of Audit Trail changes exceeds the specified cache size. You can also flush cached entries by logging out of the current session and then logging back in to check the Audit Trail data.

To disable Audit Trail for an application

- 1** Launch Siebel Tools.
- 2** In the Object Explorer, double-click the Application object to expand it and select Application Event Services.

- 3 In the Application Event Services list, inactivate the Audit Trail Engine business service record. (Look for a record with the following values.)

Name Field	Value Field
Business Service	Audit Trail Engine
Event Name	Start
Method Name	Start

Use the following procedure to enable a customized application object for auditing, or to re-enable an application object that has been turned off.

To configure an application for Audit Trail

- 1 Launch Siebel Tools.
- 2 In the Object Explorer, double-click the Application object to expand it and select Application Event Services.
- 3 In the Application Event Services list, add the following record if it does not already exist.

Name Field	Value Field
Business Service	Audit Trail Engine
Event Name	Start
Method Name	Start
Name	Start
Sequence	1 or the next available sequence number

This chapter explains the procedures necessary to administer message broadcasting and alerts for Siebel applications.

As an administrator, you can use message broadcasting and alerts to make sure that specific users get the necessary and time-critical information they need, displayed in a format that does not interfere with their work in progress.

About Message Broadcasting

Message broadcasting provides a platform for administrators and other users with access to the Message Broadcasts view to send important information directly to users' screens. Typically, this information is time-critical, such as a due date, or it is updated frequently, such as a call queue's status.

For example, to help agents manage their workflow and respond appropriately to calls, call centers may try to keep agents up-to-date on key statistics about call queues, such as the number of calls waiting, the average time in queue, and other important data. Traditionally, these statistics are displayed on a scrolling LED "ticker" on the wall. This approach presents several problems:

- Agents have to look away from their screens to view the information.
- Agents can miss important information, if they do not look at the right time.
- Agents often get information that is not relevant to them.

Message Broadcasting addresses these problems by allowing administrators to send relevant messages to individuals, groups, or an entire team. The messages can be displayed by one of the following two methods:

- Scroll messages in the message bar across the bottom of a user's screen, visible at all times.
- Display messages in a dialog box in the middle of the screen, in addition to scrolling across the bottom of the screen.

Message Broadcasts can be created through the administration view, automatically from Siebel Business Process Designer, or remotely from a third-party application through Siebel EAI.

Message Broadcast messages are retrieved from the Message table through the Siebel application server and sent to the message bars of the targeted Siebel Web client sessions. There is no set order for the messages to appear on the message bar, that is, the order cannot be controlled by the administrator or the end user.

Users can disable their scrolling message bar, but the administrator can override this setting for broadcast messages.

About Alerts

Alerts provide a platform for administrators and other users with access to the Alert Administration view to send long, complex, and customized messages directly to selected groups of recipients. Typically, these messages are time-critical, but also need to have associations with data in the company database (for instance, literature or products) and to be customized for the recipient.

For example, to communicate product pricing changes to a sales team with members around the world, a sales manager would want to be able to distribute new pricing structures and product information as soon as they are approved. Traditionally, this would be done with email messages, phone calls, or mailed literature. This approach presents some problems:

- To provide the necessary details, a large quantity of information may need to be distributed, with file attachments or links provided by the manager.
- Different team members may require different price list or product information, depending on their organization, division, or position.
- Distributing information to remote team members may produce a communication lag time.

As an administrator, you can use alerts to make sure that the specific users get the appropriate information that they need.

Features of alerts include the following:

- The abstract of alert messages are displayed in an applet on the recipients' home page, listed in order of the priority specified by the sender. Recipients can click on the abstract to read the entire message.
- Literature items and products can be associated with alerts.
- Access to price list and product information available to different team members may be controlled by organization, division, or position.

Business Scenario for Using Alerts

This scenario provides an example of a process flow performed by an administrator and sales manager. Your company may follow a different process flow according to its business requirements.

A multinational software development corporation uses the Siebel Sales application to automate their sales workforce. The company is organized geographically by division for the purpose of access control, and alerts are enabled.

An international sales manager has just been given the go-ahead for a new set of software product bundles, which include one new product. He needs to communicate these price changes to his company's sales force as soon as possible. Because pricing varies by geography, each of the four major geographical regions represented by his company's four sales divisions need to receive a customized message about the new product bundles. He tells the Siebel administrator the details of the alert message that needs to be sent.

The Siebel administrator creates the alert message, and associates a price list and the new product with the message. She creates keywords that users will be able to search on to find the message at a later date, if necessary.

When the Siebel administrator sends the alert, a customized message is sent to all members of the international sales force, with the appropriate price list for their division associated. Each member sees the alert message on their home page upon login to the Web client or downloads alerts during synchronization. These users can navigate through the home page or Site Map to read the text and any associated literature items or products.

Example Process Flow for Message Broadcasting and Alerts

This is an example process flow for administering message broadcasting and alerts. Your company may follow a different process flow according to its business requirements.

- 1 Enable message broadcasting.** For information, see [“Enabling and Disabling Message Broadcasting” on page 116](#).
- 2 Create a Message Broadcast.** For information, see [“Creating a Message Broadcast” on page 119](#).
- 3 Optionally, create script to automatically update broadcast message text.** For information, see [“Creating Broadcast Messages with Multiple Severity Levels” on page 121](#).
- 4 Create an alert.** For information, see [“Creating Alerts” on page 126](#).

Enabling and Disabling Message Broadcasting

By default, message broadcasting is enabled. As an administrator, you can enable or disable message broadcasting at the server level using the following modes:

- Always enabled
- Always disabled
- User enabled (default)

To enable or disable message broadcasting at the server level

- 1** From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2** In the Components list, choose the object manager for the application, for example, Field Service Object Manager (ENU).
- 3** Click the Component Parameters view tab.

- 4 In the Component Parameters list, select the Application Message Bar Flag record and edit the Current Value field, referring to the following table:

Parameter Value	Description
TRUE	Message broadcasting is always enabled. Users cannot disable message broadcasting by setting their personal preferences. For a Web client deployment, the Siebel application will push messages to users. For mobile client users, messages will be synchronized.
FALSE	Message broadcasting is always disabled. The message bar and message broadcast alerts will not appear on users' screens. For a Web client deployment, the Siebel application server will not push messages to users. For a mobile client users, messages will not be synchronized.
User Enable ¹	<p>This is the default setting. Message broadcasting is enabled; however, users can set their user preferences to enable or disable message broadcasting. When a Web client user disables message broadcasting, the Siebel application server will not push messages to the user. When a mobile client user disables message broadcasting, messages will not be synchronized.</p> <p>For information on how users can change user preferences, see <i>Fundamentals, MidMarket Edition</i>.</p> <p>To send message broadcast alerts to users who have disabled the message bar, see “Enabling Broadcast Alerts with User-Disabled Message Bars” on page 118.</p>

1. Or any value other than true or false.

NOTE: If you set the Application Message Bar Flag parameter to true, you can specify the update interval for the message bar by selecting the Application Message Bar Update parameter and editing the Current Value. The default value is 120 seconds.

If you set the Application Message Bar Flag parameter to User Enable, the update interval is a user preference. For more information, see *Fundamentals, MidMarket Edition*.

To enable or disable message broadcasting on mobile and dedicated Web clients

- 1 Use a text editor to open the .cfg file for your Siebel application.
- 2 Find the ShowMessageBar parameter in the .cfg file.

For example:

```
ShowMessageBar="TRUE"
```

- 3 Set the parameter value to TRUE, FALSE, or User Enabled.

See [Step 4 on page 117](#) of the preceding procedure for more information.

NOTE: If you set the ShowMessageBar parameter to true, specify the update interval for the message bar by adding the following line to the .cfg file:

```
MessageBarUpdateInterval = seconds
```

where *seconds* is the interval in seconds between message bar updates (refreshes). The default value is 120 seconds.

- 4 Save and close the .cfg file.

Enabling Broadcast Alerts with User-Disabled Message Bars

When message broadcasting is set to User Enabled, users can set their preferences to activate or deactivate the message bar on their screen. As an administrator, you can specify that message broadcast alerts appear to users in an alert box in the middle of their screen, even when they have chosen to deactivate their message bar. To do so, perform the following steps.

NOTE: To make sure your changes take effect for mobile users, follow these steps before extracting mobile user databases. For more information, see *Siebel Remote Administration Guide, MidMarket Edition*.

To show message broadcast alerts to users who deactivate their message bar

- 1 From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
- 2 Change the Always Show Message Bar Alerts preference to TRUE.

Creating a Message Broadcast

When you create a message broadcast, all connected users that you specify will receive the message immediately upon the date and time you have specified that the message be activated. Mobile users, such as field representatives, will receive the activated messages when they synchronize.

NOTE: To send a message broadcast, you must have responsibilities that include access to the Message Broadcasts view.

To create a message broadcast

- 1 From the application-level menu, choose View > Site Map > Communications Administration > Message Broadcasts.
- 2 In the Message Broadcasts list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Abstract	A brief description of the message.
Activation Date/Time	<p>Date and time at which you want to start broadcasting the message. If the Activation field is left blank, the message is broadcast immediately.</p> <p><i>Note:</i> The date and time are taken from the Siebel server (not from the machine where the client browser is running). Make sure that the date and time are set correctly on the Siebel server.</p>
All	Check this option to broadcast the message to all users.
Broadcast	Required to send the message broadcast to recipient's message bar. Check this option to broadcast and display the message. If not checked, the message is not broadcast in the message bar at the bottom of the screen.
Division	<p>The broadcast message is sent to all users associated with the divisions selected in the Divisions dialog box.</p> <p>This field can be used in combination with the Recipient field.</p>

Message Broadcasting and Alerts

Creating a Message Broadcast

Field	Comments
Expiration Date/ Time	<p>Date and time at which you want to stop broadcasting the message. If the Expiration field is left blank, the message will not expire and the message will continue to be broadcast.</p> <p><i>Note:</i> The date and time are taken from the Siebel server (not from the machine where the client browser is running). Make sure that the date and time are set correctly on the Siebel server.</p>
Message	<p>Required to create the message broadcast record. The text you want to send as the message broadcast. This field accepts up to 2,000 characters.</p> <p>To use severity levels within the message text, see “Creating Broadcast Messages with Multiple Severity Levels” on page 121.</p>
Recipient	<p>The broadcast message is sent to all users specified in the Recipients dialog box.</p> <p>This field can be used in combination with the Division field.</p> <p>For an employee name to show up in the Recipient dialog box, the employee must have a position defined and be marked active for that position. If multiple employees occupy the same position, the message will be sent to all of them, even though you only see the active employee on the list.</p> <p>Employees with multiple positions see messages sent to any of their positions, regardless of what position they log in as.</p>
Severity	<p>Required to create the message broadcast record. Choose the severity level to indicate the importance and appearance of the message.</p> <p>To force the message broadcast to appear in an alert box in the middle of the screen, in addition to its appearance on the message bar, select Urgent with Alert.</p>

Creating Broadcast Messages with Multiple Severity Levels

Typically, the appearance of a message broadcast is designated by a single severity level, as specified in the Severity field. Each severity level is associated with a different color. The severity level that you choose determines the color of the message broadcast and how it is delivered.

In addition to using the Severity field to determine the appearance of a message, you can also combine multiple severity levels to create a message broadcast with unique formatting. By adding special tags to the text of a message broadcast, you can change the color of different sections of the message. The following tags are used to combine severity levels in a message:

- [N] for Normal
- [H] for High
- [U] for Urgent

For example, if your message has a severity of normal, but you want specific text to be highlighted, you can tag parts of the text with the code for High or Urgent. Here is an example:

The trunk line from [H]Chicago, Illinois [N]is [U]DOWN!

The beginning of the message will appear in the color for the severity of the message, Normal; the words *Chicago, Illinois* will appear in the color for High; and the word *DOWN!* will appear in the color for Urgent.

To send a message broadcast with multiple severity levels

- 1 From the application-level menu, choose View > Site Map > Communications Administration > Message Broadcasts.
- 2 In the Message Broadcast list, add a new record.
- 3 Complete the required fields to broadcast your message.

For descriptions of the fields, see the table in [Step 2 on page 121](#).

- 4 In the Message field, enter the message broadcast text you want to send.

- 5** In the Message field, insert severity level tags as necessary to set the appearance of the message broadcast text.

For example: [H] All employees [N] must submit expense reports by [U] April 1, 2002.

Automatically Updating Message Broadcasting Text

As an administrator, you can customize message broadcasting to automatically update message text that changes frequently. For example, a call center's queue statistics frequently change. Every few minutes, an administrator has to update the statistics to make sure agents have the most accurate information. This manual approach is very time consuming and inefficient when dealing with frequently changing data.

You can use Siebel eAI to automatically update message broadcasting text. Your CTI middleware or ACD switch can provide the data for the Siebel application to distribute.

The Broadcast Message business component manages the messages. The fields of this business component are listed and described in [Table 11](#). These field names are necessary for developing the integration object.

Table 11. Field Names for the Broadcast Message Business Component

Field	Description
Abstract	Short summary for identifying the purpose of a message, such as "Calls In Queue"
Activation Date/Time	When the message broadcasting should begin
All	To broadcast the message to all employees with positions defined
Body	The text of the message displayed in the message bar
Division	Used to set recipients using division
Division Id	The internal identification value for Division
Expiration Date/Time	When the message broadcasting should end
Position	Used to set recipients using position
Position Id	The internal identification value for Position
Recipient	Used to set recipients using employee
Recipient Id	The internal identification value for Recipient

Table 11. Field Names for the Broadcast Message Business Component

Field	Description
Type	Severity of the message as defined in the List of Values type BRDCST_MSG_TYPE
Via Broadcasting	To send the message using message broadcasting

A sample Visual Basic (VB) script follows, which demonstrates how to create and update a broadcast message with information, using the call center queue as an example. The sample Visual Basic script is generic; your CTI middleware's API determines the structure of syntax like the Msg command.

Sample Message Broadcasting Script

The script can be created through a button, an Excel macro, or another VB application. Because it is a script and not an application, it does not need the VB Set command. All the commands are standard to VB coding.

This script is designed to update a message without an expiration date, not to create a new message every time. For more information on how to get or create a Siebel Application Object, refer to *Siebel Tools Online Help, MidMarket Edition*.

CAUTION: The code in this example updates single value fields. For information on how to update multi-value fields, refer to *Siebel Tools Online Help, MidMarket Edition*.

```
'Get "Broadcast Message" BusComp
  Set BusObj = SiebelApplication.GetBusObject("Broadcast
  Message", errCode)
  Set BusComp = BusObj.GetBusComp("Broadcast Message", errCode)

'Find "Calls Waiting" message
  BusComp.SetSearchSpec "Abstract", "Calls In Queue", errCode
  BusComp.ExecuteQuery 0, errCode
  If BusComp.FirstRecord(errCode) <> True Then

'We need to create a new message
  BusComp.NewRecord 0, errCode
  BusComp.SetFieldValue "Abstract", "Calls In Queue", errCode
End If
```

```
`Prepare message using middleware API info.  
    Set Msg = "[N]Calls Waiting: [U]10"  
  
'Update the record  
    BusComp.SetFieldValue "Body", Msg, errCode  
    BusComp.SetFieldValue "All", "Y", errCode  
  
'Write the record  
    BusComp.WriteRecord errCode
```

In addition to writing a script, you can use Siebel Business Process Designer to create or update a broadcast message. For more information, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Creating Alerts

When you create an alert, all connected users that you specify will receive the alert immediately upon its activation date and time. Mobile users, such as a sales force, will receive an activated alert upon synchronization.

NOTE: Before creating alerts, review *Release Notes* for information about Alerts (Message Alerts).

To create and send an alert

- 1 From the application-level menu, choose View > Site Map > Alert Administration.
- 2 In the Alerts list, add a new record and fill in the appropriate fields in the list and More Info form.

Some fields are described in the following table.

Field	Comments
Priority	The priority of the message determines where the message appears in the list of alerts on the users' home pages. Messages with the highest priority will be at the top of the list.
Keyword	Enter keywords that the user will be able to search on to find this message.
Type	<div>The type chosen from the drop-down list helps determine who will receive the alert, as follows:</div> <ul style="list-style-type: none">■ Employee Home Page Alert: Displays the alert on all employees' home pages.■ Partner Alert: Displays alerts to employees of registered partner companies.■ Program Information: Displays the alert to self-registered, individual partners.■ Public Information: Displays the alert to unregistered, anonymous users.

Field	Comments
Abstract	Enter a brief abstract that summarizes the message. This will appear as a hyperlink on the appropriate users' home pages.
Activation	Enter the date when the message will first appear to users.
Expiration	Enter the date when the message will no longer appear to users.
Partner Alert	Indicates that the alert is intended for partner companies. Make sure that this field is selected so that your alert will be seen.
Employee Alert	Indicates that the alert is intended for employee users. Make sure that this field is selected so that your alert will be seen.
All Users	Select this box if you want the alert to appear to all users, as indicated by the Employee Alert or Partner Alert check boxes. For example, if the Employee Alert check box is checked, and the All Users check box is checked, all employees will receive the alert.
Message Body	Type in the text of the message, including HTML formatting code if desired. Alerts can be enhanced by using the following HTML formatting codes: <ul style="list-style-type: none"> ■ <code>< b > text < /b ></code> = bold ■ <code>< u > text < /u ></code> = underline ■ <code>< i > text < /i ></code> = italics ■ <code>< h4 > text < /h4 ></code> = font size ■ <code>< a > href = "http:text" < /a ></code> = hyperlink to Web page or site
Message Body Preview	Displays message as it will look to users.

3 If you want to add literature as an attachment to the message:

- a** Click the Literature view tab.
- b** In the Literature list, click Add.

- c** In the dialog box, select the Literature record or records you want to add, and click OK.

NOTE: Only literature of type Sales Tool can be added.

- 4** If you want to add a product as an attachment to the message:
 - a** Click the Product view tab.
 - b** In the Product list, click Add.
 - c** In the dialog box, select the product or products you want to add, and click OK.
- 5** If you want to specify the recipients of this message:
 - a** Click the Recipients view tab.
 - b** From the Show drop-down list, select Recipient Divisions or Recipient Positions, and click Add.
 - c** Select the record or records you want to add, and click OK.

Remember, if you selected the All Users check box in [Step 2 on page 126](#), the message will automatically be sent to all recipients.

This chapter describes the administrative setup tasks that need to be performed before the Messages screen and views are used.

For more information about the Messages screen and views, see *Siebel Call Center User Guide, MidMarket Edition*.

NOTE: The Messages functionality is unrelated to the message broadcasting and alerts discussed in [Chapter 6, “Message Broadcasting and Alerts.”](#)

Setting Up the Messages Workflow

To set up workflows for the Messages screen and views

- 1** Make sure that the Communications Management and the Workflow Management component groups are enabled.

For information, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

- 2** Activate the Messages workflow policies. All Messages workflow policies are in the Siebel Messaging policy group.

For information about activating workflow policies, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

- 3** Activate Siebel Message send email and Siebel Message send email for activity owner workflow processes.

For information about activating workflow processes, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Setting Up Users with the Message User Responsibility

Users with the Message User responsibility have access to the Messages views.

To set up users with the Message User responsibility

- 1** Navigate to Applications Administration screen > Responsibilities view.
- 2** Make sure that all users who need access to the Messages views are assigned the Message User responsibility.

For more information about setting responsibilities for users, read about defining responsibilities in *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.

Messages

Setting Up Users with the Message User Responsibility

This chapter describes the administration tasks associated with Siebel Global Accounts.

Siebel Global Accounts is a module that provides sales professionals with global account-level visibility into the interactions that the company's sales organization and partner's sales organizations have had with the account. Users can view all accounts, opportunities, activities, contacts, and account team members across the account hierarchy on one screen, allowing sales professionals to build a deep understanding of target accounts.

For information about viewing Global Account information, see *Siebel Sales User Guide, MidMarket Edition*.

Global Account hierarchies are not provided out-of-the-box with your Siebel eBusiness Application. They must be set up by an administrator. There are two kinds of account hierarchies that can be set up by the administrator:

- **Default.** This type of account hierarchy is based solely on the accounts' Parent fields. This account hierarchy is self-maintaining in that whenever the Parent field of any account is updated, the default hierarchy is also updated. Once set up, the default hierarchy is applied to all organizations that do not already have an organization.
- **Custom.** This type of hierarchy is created by the administrator, either by modifying the default hierarchy or from the beginning. Once set up, this hierarchy is independent of the accounts' Parent fields, and as such must be updated by the administrator when changes occur.

Business Scenario for Global Account Administration

This scenario provides an example of a process flow performed by the accounts administrator. Your company may follow a different process flow according to its business requirements.

A large company, Corp 123, wants to view consolidated data at the global account level. This company has two organizations set up in its Siebel application: a sales organization and a financial organization. The accounts administrator sets up two account hierarchies, one for each organization. These hierarchies allow end users to view the opportunities and contact information associated with parent accounts.

The sales organization uses the default hierarchy, which is based on the Parent account field. For various reasons, the financial organization requires a modified version of the account hierarchy. One of these reasons is that some accounts' billing structures are different from the accounts' purchasing structures. For example, in the case of XYZ Inc. there are four XYZ accounts who are customers of Corp 123: the XYZ Holding company, two regional subsidiaries, and a financial company. The 123 sales organization wants to view the account hierarchy where all accounts report to the parent holding company. Because all account billing for the XYZ companies is funneled through XYZ Financial, Corp 123's financial organization wants to view the account hierarchy where all accounts report to the XYZ Financial. [Figure 4](#) shows the two hierarchies.

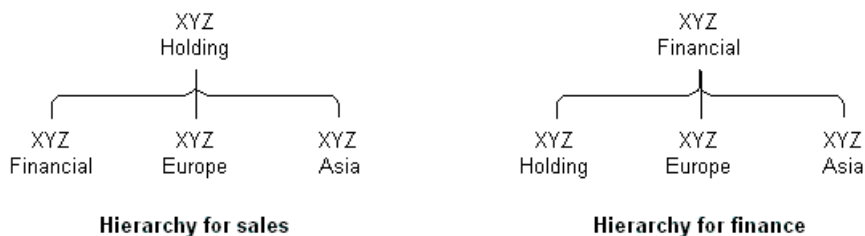


Figure 4. Examples of Account Hierarchies

The default hierarchy used by the sales organization updates automatically when new accounts are added or Parent fields are changed. However, the accounts' administrator updates the finance hierarchy on a weekly basis as new accounts are added and the structure of existing accounts changes.

Example Process Flow for Global Accounts Administration

Figure 5 illustrates the business scenario, “[Business Scenario for Global Account Administration](#)” on page 134.

These tasks should be carried out in the order presented.

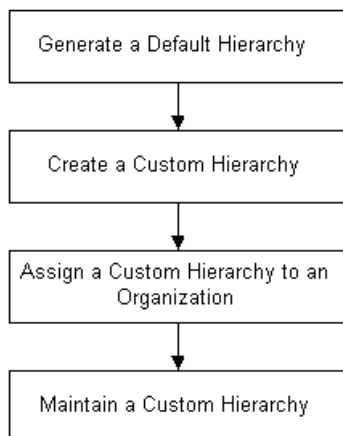


Figure 5. Example Process Flow for Global Account Administration

Generating a Default Hierarchy

Follow this procedure to set up a default hierarchy. Once generated, this default hierarchy is automatically assigned to organizations without an account hierarchy.

To change the account hierarchy assigned to an organization, see [“Assigning a Custom Hierarchy to an Organization” on page 139](#).

To create a default hierarchy

- 1 From the application-level menu, choose View > Site Map > Data Administration > Global Accounts.
- 2 In the Account hierarchy list, click Generate Hierarchy.

A new account hierarchy is created.

Some fields are described in the following table.

Field	Comments
Name	A default name is generated based on your user ID and the date.
Default	Select so that the account hierarchy is the default. The default hierarchy is assigned to all organizations without an account hierarchy and is updated when new Parent fields on the account records are added or modified.

- 3 In the Account Relationships list, review the hierarchy records.

TIP: If the generated hierarchy does not appear in the Account Relationships lists, refresh the view by navigating to a different view and then returning to the Global Accounts view.

Creating a Custom Hierarchy

You can create a custom hierarchy by generating a hierarchy as described in the preceding section or by starting from the beginning and creating a series of new records in the Account Relationships list.

To create a custom hierarchy

- 1** From the application-level menu, choose View > Site Map > Data Administration > Global Accounts.
- 2** In the Account hierarchy list, create a new record and complete the fields. Do not check Default.
- 3** In the Accounts Relationship list:
 - a** Create new records for each of the top level parent accounts. Leave the Parent Account field blank for each of these.
 - b** Create new records for the child accounts, entering the Parent Account for each.

To create a custom hierarchy based on the default hierarchy

- 1** Create an account hierarchy as described in [“To create a default hierarchy” on page 137](#).
- 2** Select the account hierarchy record and make sure that the Default field is not selected.
- 3** In the Account Relationships list, edit the Parent Account field for existing accounts and create new relationship records as required.

Accounts without Parent Accounts are at the top of the hierarchy and must be entered before their child records can be completed.

Assigning a Custom Hierarchy to an Organization

An organization uses the default hierarchy unless a custom hierarchy has been assigned to it.

To assign a custom hierarchy to an organization

- 1** From the application-level menu, choose View > Site Map > Group Administration > Organizations.
- 2** Select the organization whose account hierarchy you want to change.
- 3** In the More Info form, in the Account hierarchy field, select the custom hierarchy that you want the organization to use when viewing global accounts.

Maintaining a Custom Hierarchy

Custom hierarchies are static and must be maintained by the administrator. There are two approaches to updating an account hierarchy:

- Edit the account relationships in the current hierarchy.
- Restore the hierarchy to the default (parent account) hierarchy, and then edit the account relationships in the hierarchy.

To maintain a custom hierarchy

- 1** From the application-level menu, choose View > Site Map > Data Administration > Global Accounts.
- 2** Select the account hierarchy record.
- 3** Do one of the following:
 - In the Account Relationships list, edit the Parent Account fields for existing accounts and create new relationship records as required.
 - In the Account Relationships list, click Restore to return the hierarchy to the default, and then edit the Parent Account fields for existing accounts and create new relationship records as required.

The Opportunities screen allows you to manage and track information associated with a potential revenue-generating event. Using the Opportunities screen, you can gather customer requirements, review information about the customer, assemble a sales team, review and update information about competitors, track activities, track private notes and team notes, and create quotes.

About Opportunity Workflows

Opportunity workflows enhance lead routing and provide sales professionals with greater visibility into their sales activities. These workflows are executed from the Opportunities screen. An opportunity record describes important information about the opportunity such as the account, potential revenue of the deal, the probability of closure, the lead status and sales stage, the sales team primary, and the expected close date.

The predefined opportunity workflows allow you to use email to capture information related to the opportunity and distribute timely notifications to key members of the sales team. These workflows help improve the efficiency and effectiveness of the sales cycle while also providing sales representatives and sales managers greater visibility into sales activities. The email notification process is activated only if the opportunity has a possible revenue of more than \$50,000.

The seven predefined opportunity workflows are:

- Opportunity Assigned Notification Process
- Opportunity Inactive Notification Process
- Opportunity Lost Notification Process
- Opportunity Pending Notification Process
- Opportunity Won Notification Process
- Create rerouted Oppty Activity
- Get Manager Email

For information about configuring, implementing, testing, and monitoring workflows, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Setting Up Opportunity Notification Workflows

Follow these steps to correctly set up the opportunity workflows:

- Revise all Siebel workflows so that they are editable and have a status of *In Progress*. All Siebel workflows are initially inactive and cannot be edited. Make any necessary changes and activate the workflows.
- Verify that the Workflow Server component and the Communication Manager component are enabled and running. For detailed instructions, see the system requirements and supported platform documentation for your Siebel application.
- Set up the communication profile. See [“Setting Up the Communications Profile.”](#)
- Set up and activate the workflows and policies.
 - Activate the opportunity workflow processes. See [“Activating the Opportunity Notification Workflow Processes and Policies”](#) on page 145.
 - Modify Opportunity workflows, as necessary. See [“Modifying Opportunity Workflows”](#) on page 150.
 - Set up the Create Reroute Oppty Activity. See [“Rerouting an Opportunity”](#) on page 149.
 - Set up the Get Manager Email. See [“Setting Up the Get Manager Email”](#) on page 153.
- Load runtime events for the emails. See *Siebel Business Process Designer Administration Guide, MidMarket Edition*.
- Generate the triggers. See *Siebel Business Process Designer Administration Guide, MidMarket Edition*.
- Run the workflow monitoring agent. See *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Setting Up the Communications Profile

You must specify the communications profile before using the notification workflows.

To set up the communications profile

- 1** From the application level menu, choose View > Site Map > Communications Administration > Communications Drivers and Profiles.
- 2** Select the record for the Internet SMTP/POP3 Server driver.
- 3** Click on the Profiles tab, and create a new profile. Name the profile *Opportunity Notification Profile*.
- 4** In the Profile Parameter Overrides list, enter records and values for the following fields:
 - From Address
 - SMTP Server

For more information about implementing and configuring communications integrations for your Siebel applications, including creating profiles for the Internet SMTP/POP3 Server driver, see *Siebel Communications Server Administration Guide, MidMarket Edition*.

Activating the Opportunity Notification Workflow Processes and Policies

There are five different workflow processes that will generate automatic emails. All of these processes need to have the communication profile specified. See [“Setting Up the Communications Profile” on page 144](#).

- Opportunity Assigned Notification Process
- Opportunity Inactive Notification Process
- Opportunity Pending Notification Process
- Opportunity Lost Notification Process
- Opportunity Won Notification Process

The following procedure sets up this automatic notification process.

To set up the opportunity workflows

- 1** From the site menu, choose View > Site Map > Siebel Business Process Administration > Workflow Processes.
- 2** Query for Opportunity *Notification*.

The five processes are displayed.
- 3** Select each process and click Revise. Each time you click Revise, a new version of the process is created with a status of In Progress.
- 4** One by one, select each new In Progress process and click Process Properties.
- 5** In the Communication Profile field, enter *Opportunity Notification Profile*.
- 6** Make any other necessary modifications to the workflow processes.
- 7** Activate each process.
- 8** From the application-level menu, choose View > Site Map > Siebel Business Process Administration > Workflow Policies.
- 9** In the Policy Group list, query for Opportunity Workflow Group.

- 10 Clear the Expiration field for each of the five workflow policies that result from the query.

Opportunity Assigned Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when a new lead is assigned to a sales representative. The email provides the basic information about the opportunity, including the opportunity ID and account, the primary revenue amount, and the number of days allowed before the lead is withdrawn and rerouted. The sales representative is directed to the Opportunities screen for further details.

Opportunity Inactive Notification Process

This workflow sends out an email notice when the sales representative has accepted a lead by changing the Status field to Accept, but has not taken any action on the lead for 30 consecutive days. An email reminder is sent to both the sales representative and the sales representative's direct manager. The notice reminds the sales representative that if no action is taken on the lead within seven days, the lead will be withdrawn from the queue and rerouted.

The default time lapse between when the lead is accepted (or last worked on) and when the email is delivered is 30 days. This default can be modified.

To change the time lapse between lead acceptance and inactive notification

- 1 From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 2 Query and select the Opportunity Inactive Notification Process.
- 3 Click the Process Properties tab.
- 4 In the Duration Days column, click the Default Number field, and modify the number.

By default, the units are in days. To modify this, navigate to the Workflow Processes and click the Process Designer tab. Double-click the Wait step. In the Input Arguments applet, change the Sleep Unit value field.

- 5 In the Workflow Processes view, make sure the Opportunity Inactive Notification Process is selected.

- 6 Activate the workflow and run the Workflow Monitor Agent. See *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

NOTE: Out-of-the-box reassignment of leads is executed manually. You may want to create a workflow that automatically reassigns the lead to a sales manager or administrator after a specified amount of time.

Opportunity Pending Notification Process

This workflow sends an email notice when the sales representative has not responded or taken action on the opportunity for five days. This occurs when the sales representative has not changed the Status field from pending to accept, reject, or reroute. The email is sent to both the primary sales representative and the sales representative's direct manager. The email reminds the sales representative to act on the lead or risk having the lead withdrawn from the queue.

To modify the time lapse between lead assignment and email delivery

- 1 From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policies.
- 2 Query for E*N*P* (email notification of pending opportunity).
- 3 Verify that the policy is activated.
- 4 Select the policy and modify the Duration and Unit(s) fields.
- 5 Activate the workflow and run the Workflow Monitor Agent. See *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Opportunity Lost Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when an opportunity is closed with a loss. The status of the opportunity must change to *lost* before the email notice is generated. The email refers to the Opportunities screen and asks the sales representative to update the Reason field.

Opportunity Won Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when an opportunity is closed with a win. The status of the opportunity must change to *win* before the email notice is generated. The email refers to the Opportunities screen and asks the sales representative to update the Reason field.

Rerouting an Opportunity

The Create Rerouted Oppty Activity workflow is executed when a sales representative receives a lead and changes the Status field to Reroute. The workflow creates a new Activity record with Type = Reroute for the designated sales operator. This informs the sales operator that a specific opportunity has been requested for rerouting. All reassigned opportunities are listed in the Activities view as rerouted activities.

NOTE: If a sales manager or sales administrator is responsible for rerouting leads, you can modify the workflow so that the Create Rerouted Oppty Activity is assigned to the sales manager or administrator. You can also create a workflow that reassigns the lead to a sales manager or administrator.

To set up the opportunity reroute activity

- 1** From the Site Map, choose Siebel Business Process Administration > Workflow Processes.
- 2** Locate and select the Create Reroute Opportunity Activity workflow process.
- 3** Click Revise.
- 4** Click the Process Properties tab.

The Status field should indicate In Progress.

- 5** In the Sales Operator Login field, replace the default with the login of the sales operator who will receive the activity. Remember that the login is case-sensitive.
- 6** Click the All Processes tab.
- 7** Click Activate.

Modifying Opportunity Workflows

An administrator can modify the opportunity workflows; the email language can be modified, the notification time can be changed, and lead notification restrictions can be set.

NOTE: The opportunity workflows are shipped as seed data. To modify a workflow, you should make a copy of the original workflow, and then modify the copy.

To modify the language of an opportunity workflow email

- 1** From the application-level menu, choose View > Site Map > Business Process Administration.
- 2** Select Workflow Processes.
- 3** Select or Query for the workflow you want to modify.
To view all seven opportunity workflows, type “O*N*”.
- 4** Click the Process Designer tab in the middle applet.
- 5** Double-click the Send Out Emails rectangle.
The Business Service Input Arguments view appears.
- 6** In the Input Arguments applet, find the input argument called Message Body and click on the Value field.
The email message text is displayed.
- 7** Make any required text changes. The text includes field placeholders for data from the opportunity record. These placeholders appear as “ + [Placeholder field] + ”.
- 8** Activate the workflow and run the Workflow Monitor Agent. For more information, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

To restrict conditions for delivery of emails

- 1** From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policies.
- 2** Select or Query for the workflow you want to modify.
To view all five email notification policies, type “E*N*”.
- 3** Select the policy to modify.
- 4** In the Conditions applet, select a condition, or add a new condition.
- 5** Click on the Operation and Value fields and modify the condition.

For example, to send email notifications for leads that have a high lead quality, add the following condition:

Condition Field = Opportunity Lead Quality

Operation = “ = ”

Value = “1-excellent”

- 6** Activate the workflow and run the Workflow Monitor Agent. For more information, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

To stop sending email notifications to a sales representative's manager

- 1** From the application-level menu, choose View > Site Map > Business Process Administration.
- 2** Query for Get Manager Email.
- 3** Click Revise.
- 4** Click the Process Designer tab.
- 5** In the designer palette, click the Connector object and drag a connector between the Start and End boxes.
- 6** Delete all other arrows.

- 7** Activate the workflow and run the Workflow Monitor Agent. For more information, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Setting Up the Get Manager Email

This process identifies the manager of the sales representative so that the manager can receive a copy of the five email notifications that are delivered. Because the Get Manager Email process is part of the five notification processes, the Get Manager Email process must be activated for the other processes to function correctly.

An email is sent to the sales representative and the appropriate manager for each of the notification workflows.

To enter the manager's email ID

- 1** From the Site Map, choose Siebel Business Process Administration > Workflow Processes.
- 2** Query for the Get Manager Email workflow.
- 3** Click Revise.
- 4** Click Activate.

Opportunity Audit Trail

The Opportunity Audit Trail allows users to track changes that have been made to the opportunity record. Any time a member of the opportunity sales team creates a new opportunity record, updates the opportunity, deletes data, or copies the opportunity, the action is tracked in the Opportunity Audit Trail view.

Initially, changes to the following fields are tracked:

- Revenue class
- Probability
- Stage
- Stage ID
- Status

To track additional fields

- 1** From the Site Map, select Audit Trail Administration.
- 2** Query for the Opportunity Bus Comp.
- 3** Click on the Field tab in the bottom applet.
- 4** Create a new record and select the new field to track from the list of values.

To enable Audit Trail

- 1** By default, Audit Trail is not activated. To activate it, navigate to Siebel Tools > Business Services > Audit Trail Engine > User Property.
- 2** Set Enable to True.

Setting Up Lead Sources for Opportunities

(Lead) sources for opportunities are added, modified, and deleted through the Lead Sources view of the Data Administration screen.

The following procedure describes how to add lead sources so that they can be associated with opportunities.

In addition, campaigns automatically appear as lead sources of type Marketing Campaign. For more information about Campaigns, see *Siebel Campaigns Guide, MidMarket Edition*.

To create a lead source

- 1** From the application-level menu, choose View > Site Map > Data Administration > Lead Sources.
- 2** Create a new Lead Sources record and complete the necessary fields.

Opportunities

Setting Up Lead Sources for Opportunities

Activities and Activity Plans 10

This chapter contains information about activities and activity templates for activity plans and sales methods and stages. The chapter focuses on administrative tasks.

For information about creating activity templates for service activities, see *Siebel Service Guide, MidMarket Edition*.

For information about end-user tasks, see *Siebel Call Center User Guide, MidMarket Edition* and *Siebel Sales User Guide, MidMarket Edition*.

About Activities

Siebel applications use activities to organize, track, and resolve a variety of tasks, from finding and pursuing opportunities to closing service requests. If a task requires multiple steps that one or more people may carry out, activities greatly simplify the job. Activities can help:

- Define and assign the task
- Provide information to complete the task
- Track the progress of the task
- Track costs and bill for the task

These are the major advantages of breaking down a task into one or more activities:

- The ownership of the problem can remain at the management level, when required.
- The employee looking at assigned activities can identify only the required information.
- Reporting is simplified.
- Activities can be assigned to more than one person.

Assignment Methods

Activities, once generated, are assigned to appropriate employees. Activity assignment can take place in a number of ways:

- Manual assignment
- Automatic assignment to the creator of the activity (by predefaulting the Owner field to the activity's creator)
- Automatic assignment using Territory Assignment Manager (see *Siebel Territory Assignment Manager Administration Guide, MidMarket Edition*).

Business Objects Associated with Activities

Siebel activity objects may be associated with other Siebel business objects. Some common associations are listed in [Table 12](#). In most cases, this association is with a set of activities defined by an activity plan and individual (or stand-alone) activities. In a few cases, an object is associated either with an activity template or with stand-alone activities.

Table 12. Association of Activity Object with Other Siebel Objects

Screen Name	Business Object	Stand-Alone Activities	Activities from Templates
Accounts	Account	Yes	Yes
Agreements	Service Agreement	Yes	Yes
Assets	Asset Management	Yes	No
Campaigns	Campaign	Yes	No
Contacts	Contact	Yes	Yes
Messages	Messaging	Yes	No
Opportunities	Opportunity	Yes	Yes
Orders (Order Line Items view)	Order Entry	Yes	Yes
Projects	Project	Yes	Yes
Quality	Product Defect	Yes	No
Service	Service Request	Yes	Yes

About Activity Templates and Activity Plans

Activity templates are created by an administrator and are blueprints for sets of activities. Activity templates can be invoked by end users to create activity plans.

Activity plans are collections of activities that are created using the activity template. They are specific instances of activity templates that have been invoked by end users.

Each activity template is associated (through its Type value) with a certain business object. See [Table 12 on page 159](#) for a list of business object and screens that use activity templates.

In Activity Plans views, only activity templates that have been associated with the active business object can be invoked. For example, on the Opportunity screen, only templates for opportunity activities are visible. Selecting a template creates all the activities defined by that template.

When the activity plan is created from the activity template, activities are created based on the activity template details defined in the activity template.

Typically, the administrator sets up the activity templates, and the end users apply the activity templates to create their activity plans.

About Sales Methods

A sales method is an approach used in the sales process. The administrator sets up sales methods and sales stages that represent the organization's desired sales process. A method may encompass every stage associated with the sales process, from prospecting to forecasting to closing deals. You can set up as many methods and sales stages as your organization needs. Sales representatives can then use the method most appropriate for their opportunities.

Sales methods can differ even within one organization. For instance, a sales method for dealing with complex multimillion dollar opportunities may include as many as fifteen stages, while a sales method of a low dollar opportunity may require only four.

Sales methods and stages are only associated with activity templates of type Opportunity.

Business Scenarios

This scenario provides an example of a process flows performed by the administrator and the end users in a sales situation. Your company may follow a different process flow according to its business requirements.

Business Scenario for Sales

A sales organization has adopted a new sales methodology in order to improve the effectiveness of its sales people. The business analyst has provided the administrator with a detailed document describing the sales method, the stages of the method, and the activities that each salesperson should perform at each stage of the deal. The outline of the document looks like this:

Our New Sales Method

- > Stage 1, Prospecting, the lead discovery phase. (Status = Open)
- > Stage 2, Qualification of the lead and working up the deal. (Status = Open)
- ✓ Stage 3, Closing the deal and entering the order. (Status = Won)
 - > Activity 1, Prepare the quote within 2 days
 - > Activity 2, Email the quote to manager for approval within 3 days
 - > Activity 3, Create the contract within 1 week
- > Stage 4, Lost deal. (Status = Lost)

The administrator creates a new sales method record (New Sales Method) and four associated sales stage records (Prospecting, Qualification, Closing, and Lost).

Next, she creates four new activity templates, one for each stage. The activity template describes the activities and milestones that the sales people should perform at that stage.

Because the sales people enter their own opportunities, the administrator sets up the activity template details so that the salesperson who enters the opportunity will be automatically assigned ownership of the activities.

By setting up lead times in the activity template details, the due dates for the activities will be calculated automatically from the date that the opportunity enters the sales stage.

Other Business Scenarios

Activities and activity templates are used in many ways throughout Siebel applications. For examples of other scenarios, see:

- *Siebel Sales User Guide, MidMarket Edition*
- *Siebel Call Center User Guide, MidMarket Edition*
- *Siebel Service Guide, MidMarket Edition*
- *Siebel Professional Services Automation Guide, MidMarket Edition*
- *Siebel Order Management Guide, MidMarket Edition*

Example Process Flow for Activities Administration

Figure 6 illustrates the process flow for the business scenario (“[Business Scenario for Sales](#)” on page 162).

The tasks are typically, but not necessarily, carried out in the order presented.

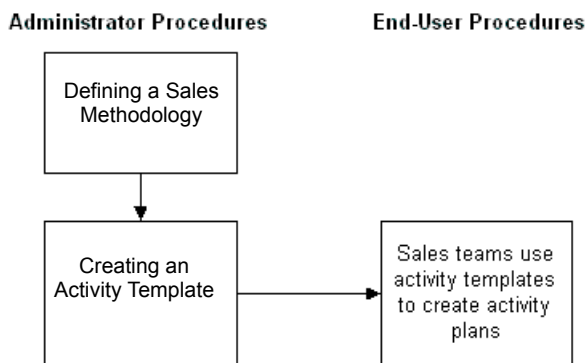


Figure 6. Example Process Flow for Sales Business Scenario

Defining a Sales Methodology

There are two parts to creating a sales methodology:

- Creating the sales method record
- Creating a sales stage record for each stage in the methodology

NOTE: Sales methods and stages are associated with activity templates of type Opportunity. If you are not intending to create a template of this type, you do not need to define a sales methodology.

You use the Sales Methods view of the Applications Administration screen to define sales methods and to create and associate sales stages with each of those methods.

To create a sales method and associated sales stages

- 1** From the application-level menu, choose View > Site Map > Application Administration > Sales Methods.
- 2** In the Sales Methods list, create a new record and complete the necessary fields.

- 3** In the Sales Stages list, create a new record, and complete the necessary fields.
Some fields are described in the following table.

Field	Comments
Phase	<p>This value is used for rolling up many different stages into phases. Select the one that best matches the stage you are currently adding. For example, a stage called Prospecting would best match the lead discovery phase.</p> <p>The choices in this drop-down list are configured by using the SALES_STAGE_PHASE_TYPE type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.”</p> <p>The default choices are:</p> <ul style="list-style-type: none">■ A - Lead Discovery■ B - Working the Deal■ C - Closing■ D - Lost Deal
Status	<p>The choices in this drop-down list are configured by using the SALES_STAGE_STATUS type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.” The default choices are Open, Won, and Lost.</p>
Quota Factor	<p>The amount by which a sales representative’s quota will be multiplied by for that sales stage.</p> <p>As you move deals from one stage to another, some deals will fall out of the pipeline. In order to eventually close \$1,000,000 in revenues, you might need \$10,000,000 worth of stage 01 deals, or \$5,000,000 worth of stage 04 deals, or \$1,500,000 of stage 08 deals. This means your quota factors in this case will be 10 for stage 01, 5 for stage 04, and 1.5 for stage 08.</p> <p>In your Siebel application, a sales representative’s quota is the sum total of his or her revenue quota objectives on all of his or her active quota plans.</p> <p>The default value is 1.</p>
Order	<p>The sales stage’s position in the list of values in the Opportunities screen.</p>

Field	Comments
Win Probability	The probability or likelihood (out of 100) that, after successfully completing this stage, the deal will eventually be won. In theory, the later the stage, the higher the win probability should be, because each stage brings the salesperson closer to winning the deal.
Duration	The number of days in a particular stage required for an average deal under average circumstances.
Stalled Deal Limit	The number of days that an opportunity can be in a particular sales stage. If the opportunity exceeds this limit, you can consider the deal to be stalled. There is no effect on the sales stage or any other aspect of the opportunity.

Before the Sales Method and Sales Stage can be used, the cache may need to be refreshed. For more information, see [“Clearing the Cache” on page 94](#).

Creating an Activity Template

You use the Activity Templates view of the Applications Administration screen to create activity templates.

NOTE: For information about creating service activity templates using the Service Details view, see *Siebel Service Guide, MidMarket Edition*.

To create an activity template without grandchild records

- 1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
- 2 In the Activity Templates list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Sales Stage	<p>If you are creating a template of type Opportunity, select the sales stage with which you would like to associate the activity template. When the sales stage is selected, the Sales Method field is automatically filled in.</p> <p>When this sales stage (and sales method) are specified for an opportunity, the activity template is used to automatically populate the Activity Plan and Activity lists for that opportunity.</p> <p>For information about creating sales stages and methods, see “Defining a Sales Methodology” on page 165.</p>
Type	<p>Select the type that specifies where you would like the template to be available. For example, select Account if you want to use this template to create activity plans for accounts, or Milestone for TAS customer milestones.</p> <p>The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.”</p>

Field	Comments
Sales Method	When the sales stage is selected, the Sales Method field is automatically filled in.
Public	There is no logic associated with this field. You may choose to use it in conjunction with workflows and search specifications.

- 3 Click the Activity Template Details view tab.
- 4 In the Activity Templates Details list, create a new record, and complete the fields.

Some fields are described in the following table.

Field	Comments
Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.”
Duration	The time in minutes needed to complete the activity.
Lead	The lead time for the activity.
Units	Units of time to measure the lead time of the activity.
Employees	User names of the people who are to perform the activity. See “About Activity Assignment” on page 172.
Lock Schedule	This field is used for service activity templates. For more information, see <i>Siebel Service Guide, MidMarket Edition</i> .
Work Time	This field is used for service activity templates. For more information, see <i>Siebel Service Guide, MidMarket Edition</i> .
Alarm	Whether an alarm should go off when it is time for the activity.
Category	See “About Activity Assignment” on page 172.
Lock Assignment	Whether the Employees field should be locked. If it is unlocked, the territory Assignment Manager can reassign it.

Field	Comments
Required	This check box indicates that the activity must be completed. This is for information only; there is no associated code.
Display In	Choose to display the activity in the Calendar screen, the Activity screen, or in both. This field is not displayed by default.

- 5 Create a new activity template detail record for each activity associated with the activity template.

Deleting an Activity Template

CAUTION: If you delete an activity template, *all* activities associated with activity plans that reference the template are also deleted.

To delete an activity template

- 1** From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
- 2** In the Activity Templates list, select and delete the activity template record.

About Activity Assignment

Activities created using activity templates can be assigned automatically to:

- The employee who is specified in the template
- The employee who creates the activity, using activity templates (this is usual in a sales situation)
- No employee (this is recommended when Territory Assignment Manager will be used to assign the activity)

The assignment is determined by the values in the Employee and Category fields of the activity record in the Activity Template Details list, according to [Table 13](#).

Table 13. Employee and Category Values Determine Activity Assignment

If Employee Is...	and Category Is...	Then the Activity Is...
NOT NULL	<i>any value</i> (NULL or NOT NULL)	assigned to the employee who is specified in the Employee field of the template.
NULL	Field Engineer Activity Repair Activity, Preventive Maintenance, or Other	not assigned. The Employee and Owner fields are blank in the created activity.
NULL	<i>not</i> Field Engineer Activity, Repair Activity, Preventative Maintenance, or Other	assigned to the employee who creates the activity (by applying the activity template).

NOTE: Activities created directly in the Activities screen are similarly affected by the Category value. If the Category value is changed to Field Engineer Activity, Repair Activity, Preventive Maintenance, or Other, the values of Owner and Category fields will be deleted and set to NULL when the record is saved.

Information for Configurators of Activities

This section describes some aspects of the activities that configurators or administrators may want to change:

- [Configuring Owner and Employee Fields](#)
- [Creating TAS Customer Milestone Templates in a Localized Application](#)

Configuring Owner and Employee Fields

Depending on your business process, you may want to configure the Siebel application so that the Employees and Owner fields for activities are *always* left blank when the activity is created. (The Owner field displays the primary from the Employee field.)

To achieve this, use Siebel Tools to set the pre-default value of the Primary Owned By field (which maps to the Owner field that appears in the UI) in the Action business component to blank.

For information about using Siebel Tools, see *Siebel Tools Reference, MidMarket Edition*.

Creating TAS Customer Milestone Templates in a Localized Application

The sample TAS Customer Milestone activity template is available only in English. If you are running a localized version of the Siebel Sales application (that is, a version in a language other than English) and are using the Target Account Selling (TAS) module, you need to create an activity template of type *Milestone*, as outlined in the following procedure.

To translate a TAS Customer Milestone template for a localized application

- 1 From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.

- 2** In the Activity Templates list, query for records of type *Milestone* where *Milestone* is the translation of the English word in the localization language.

NOTE: For the translation, see the Interface Terminology Look-up manual for your language, or, in the List of Values, look for the Display Value that corresponds to the Language-Independent Code for Milestone. For more information about List of Values, see [Chapter 4, “Working with Lists of Values.”](#)

Six records should be found by the query:

- 1-Request Offering(s)
- 2-Evaluate Offering(s)
- 3-Approve / Select
- 4-Legal / Purchasing
- 5-Implement
- 6-Measure

- 3** For each of the six templates:
 - a** Click the Activity Templates Detail view tab.
 - b** Make sure that for each detail record, the Type is *Recommended Activity* where *Recommended Activity* is the translation of the English phrase in the localized language. (See note in [Step 2](#).)
 - c** Optional: Translate the Description of each detail record into the localized language.
- 4** Follow the procedure for adding a milestone in the *Siebel Sales User Guide, MidMarket Edition*. Make sure that the six Activity Templates ([Step 2](#)) appear in the Event field drop-down list.

This chapter describes the resource and calendar access tasks performed by the administrator.

About Resources

Resources are typically things such as conference rooms and audio-visual equipment that are reserved and used by employees for meetings and other calendar activities. Resources have availability associated with them and can be invited as participants to calendar activities in much the same way as employees and contacts are invited to calendar activities. For more information about adding participants to activities, see *Fundamentals, MidMarket Edition*. The administrator is responsible for setting up and maintaining the list of resources.

About Calendar Access

Normally employees grant each other access to their calendars as described in *Fundamentals, MidMarket Edition*. However, there are various situations when the administrator may be required to add, modify, or delete calendar access for employees.

Business Scenarios for Calendar Administration

These scenarios provide examples of calendar tasks performed by the administrator. Your company may follow a different process according to its business requirements.

Resource Administration

Here are two scenarios requiring resource administration:

- Before the Siebel application is rolled out to end users, the administrator creates resource records. He creates resource records for all the conference rooms for the various floors and buildings of the company's sites. He also creates resource records for the audio-visual equipment that employees may want to reserve for use at their meetings.
- After the Siebel application is rolled out, the company grows and more sites and conferences rooms are added. Old audio-visual equipment is discarded and new equipment is purchased. The administrator continues to maintain the list of resources, keeping it up-to-date.

See [“To administer resources for calendar activities” on page 179](#) for the procedure associated with these scenarios.

Calendar Access Administration

Here are three scenarios requiring calendar access administration:

- Employee A is out of the office unexpectedly. Employee B needs to view Employee A's calendar so that she can cancel his appointments. Employee B asks the administrator to give her access to Employee A's calendar. See [“To give Employee B access to Employee A's calendar” on page 180](#).
- An executive has been granted access to many of his colleagues calendars. When the executive moves to a new division, he no longer needs to access to these employees' calendars. He asks the administrator to clear the list by removing his name from all employees' Calendar Access List views. Alternatively, the executive could have contacted all the employees whose calendars are on his Owner drop-down list and asked each of them to remove his name from their calendar access lists. See [“To remove all employees from an employee's Calendar Owner drop-down list” on page 182](#).

- When an employee leaves the company, the administrator removes the employee's name from the Owner lists of other employees. See [“To remove an employee from all employees' Calendar Access List views” on page 182.](#)

Example Process Flow for Calendar Administration

Figure 7 illustrates the process flow for the business scenario.

Setting up of resources is completed before the end users begin to set up meetings. Other tasks are carried out according to the company's business needs.

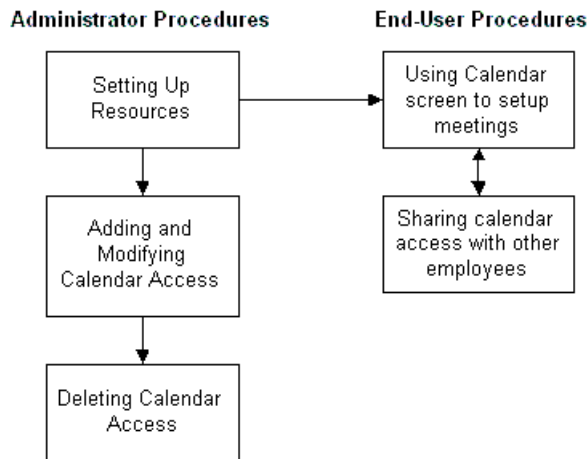


Figure 7. Example Process Flow

Setting Up Resources

To administer resources for calendar activities

- 1 From the application-level menu, choose View > Site Map > User Administration > Resources.
- 2 In the Resources list, create a new record or select an existing record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Resource #	An automatically generated unique number for the resource.
Site	The choices in this drop-down list are configured by using the RESOURCE_SITE type in the List of Values.
Type	The choices in this drop-down list are configured by using the RESOURCE_TYPE type in the List of Values.

TIP: If the Description and Site fields are not sufficient to identify the resource, other fields can be added to the Resources list applet. For example, your company may want to add Building Number and Floor fields to help end users find and identify resources. For information on adding creating and exposing fields, see *Siebel Tools Reference, MidMarket Edition*.

- 3 Delete resource records as required from this list.

Adding and Modifying Calendar Access

There are two Calendar Administration applets on the Calendar Administration view; both can be used to modify calendar access:

- Access Received lists all the calendars that the selected employee can access.
- Access Granted lists all the employees who can access the selected employee's calendar.

You can toggle between these applets using the Access Granted/Access Received drop-down list in the lower applet.

To give Employee B access to Employee A's calendar

- 1** From the application-level menu, choose View > Site Map > User Administration > Employees.
- 2** In the Employees list, select the employee (Employee A).
- 3** Click the Calendar Administration view tab.
- 4** From the drop-down list on the Calendar list, select Access Granted.
- 5** In the Calendar list, create a new record or select an existing record and complete the Last Name and Update Access fields.

Field	Comments
Last Name	This is the name of the Employee B who wants to access Employee A's calendar.
Update Access	If this is selected and marked Y, Employee B has read/write access to Employee A's calendar. If this is marked N, Employee B has read-only access to Employee A's calendar.

To view all the calendars to which an employee has access

- 1** From the application-level menu, choose View > Site Map > User Administration > Employees.

- 2** In the Employees list, select the employee.
- 3** Click the Calendar Administration view tab.
- 4** From the drop-down list on the Calendar list, select Access Received.

The Calendar Administration list shows all calendars to which the employee has access.

NOTE: Records can be added, modified, and deleted from this view.

Deleting Calendar Access

For a selected employee, the administrator can delete all employees from the Access Granted or the Access Received list.

To remove all employees from an employee's Calendar Owner drop-down list

- 1** Navigate to the Calendar Administration view by following [Step 1](#) to [Step 4](#) in [“To view all the calendars to which an employee has access” on page 180.](#)
- 2** Make sure that you have selected the employee whose Calendar view Owner drop-down list you want to clear.
- 3** From the menu button in the Access Received list, select Delete All.

This command deletes *all* records in the list. The employee selected in the Employees list no longer has access to *any* calendars other than his or her own.

NOTE: Alternatively, you can use the Delete Record command to remove just one selected employee from the employee's calendar owner drop-down list.

To remove an employee from all employees' Calendar Access List views

- 1** Navigate to the Calendar Administration view by following [Step 1](#) to [Step 4](#) in [“To give Employee B access to Employee A's calendar” on page 180.](#)
- 2** Make sure that you have selected the employee that you want to remove from all employees' calendar access lists.
- 3** From the menu button in the Access Granted list, select Delete All.

This command deletes *all* records in the list. The calendar of the employee selected in the Employees list can not longer be accessed by *any* other employees.

NOTE: Alternatively, you can use the Delete Record command to delete the employee from one selected employee's calendar access list.

Information for Configurators of the Calendar

This section describes some aspects of the Calendar feature that configurators or administrators may want to change:

- [Alarm Manager Load Frequency](#)
- [Days Displayed in Calendar Gantt Chart](#)
- [Days for Retroactive Alarms on page 184](#)
- [Changing Required Fields in the eCalendar Detail Applet on page 184](#)
- [Removing the To Do List from the Calendar View on page 184](#)

Alarm Manager Load Frequency

A system preference called Alarm Manager Load Frequency determines how frequently the calendar alarm queries the server for alarm-enabled appointments. The default value is 60 minutes, but you may want to change this time to better suit your business needs: querying the server less frequently results in fewer SQL calls. However, each SQL call will take longer to execute. In certain cases, this trade-off will result in improved performance.

For information on how to edit system preferences, see [“Setting System Preferences” on page 44](#).

Days Displayed in Calendar Gantt Chart

The number of days displayed in the Participant Availability Gantt chart (Calendar Detail view) can be changed using Siebel Tools.

There are two user properties associated with the HI Gantt Chart Applet (see [Table 14](#)); these determine the days displayed.

Table 14. User Properties for HI Gantt Chart Applet

Applet User Property	Description
Gantt Previous Days	Number of days before current date that will be displayed
Gantt Lookahead Days	Number of days after current date that will be displayed

In the preconfigured application, the chart displays the day of the appointment plus the two days following the appointment day (Gantt Previous Days = 0 and Gantt Lookahead Days = 2).

For information about:

- Participant Availability Gantt chart, see *Fundamentals, MidMarket Edition*.
- Editing user properties, see *Siebel Tools Reference, MidMarket Edition*.

Days for Retroactive Alarms

Retroactive alarms are alarms for past events that did not display before the event because the user was not logged in. By default, the application is set to display retroactive alarms for missed events up to 14 days in the past. You can change the number of days for retroactive-alarm display by editing the RetroAlarmInterval user property of the Alarm Manager business service.

For more information about editing user properties, see *Siebel Tools Reference, MidMarket Edition*.

Changing Required Fields in the eCalendar Detail Applet

In the preconfigured application, the Type field is the only required field in the Calendar Detail form in the Calendar Detail view. If you make other fields required, you must predefault these fields. This is because when users create a new record or drill into a record from the calendar grid, an implicit save of the record is triggered. If any fields are required but not predefaulted, their values will be null when the implicit save is triggered and an error message will be generated. For more information about predefaulting fields, see *Siebel Tools Reference, MidMarket Edition*.

Removing the To Do List from the Calendar View

You can configure the daily, weekly, monthly calendar view (HI Activity Calendar View) so that the Calendar To Do list applet does not appear.

You might choose to do this if your employees do not use the To Do list or if you need more space for the calendar applet on the view.

To remove the To Do list from Calendar views

- 1 Open the CCViewHIC.swt file in a text editor.

For more information about SWT (Siebel Web Template) files, see *Siebel Tools Reference, MidMarket Edition*.

- 2 Comment out the following text (the first line is already commented):

```
<!--Column 2 -->  
  
<td valign="top" width="21%">  
  
    <swe:for-each count="20" iteratorName="currentId" startValue="201">  
  
        <swe:applet hintMapType="Applet" id="swe:currentId" property="Formatted...  
  
    </swe:for-each>  
  
</td>
```

- 3 Save and close the file.

License Tracking 12

This chapter describes the features of Siebel License Tracking.

Using Siebel License Tracking, you can:

- Monitor and track the usage of the Siebel applications
- View and maintain usage metrics
- Automatically receive notification if the number of active clients exceeds the number of licenses

There are two kinds of license tracked by Siebel License Tracking:

- **Named-user licenses.** Employee and partner applications, such as Call Center and Siebel Partner Relationship Management, are usually licensed on a named-user basis.
- **Concurrent-usage licenses.** Customer applications, such as eService and eCampaigns, are usually licensed on a concurrent-user basis.

Business Scenario for License Tracking

This scenario provides an example of a process flow performed by the administrator. Your company may follow a different process flow according to its business requirements.

The system administrator for a large company is responsible for monitoring usage of the company's Siebel applications. The company uses Siebel Sales internally. All employees in the sales department are registered users (named users) of Siebel Sales. In addition, the company has recently deployed Siebel eSales so that customers can place orders online through the Web.

The company's licensing agreements state that there may be up to 2000 named users for Siebel Sales and 500 concurrent users for Siebel eSales.

When the company first upgraded to Siebel 7.5, the system administrator turned on Siebel License Tracking and configured the LicCustomerNotifyNU workflow so that he would receive email notification of any usage violations of the named-user license.

Some months later, the system administrator receives an email notification of a Siebel license exception. He navigates to the Named User Monitor view and selects the record for the Siebel Sales application; the Limit Exceed value is shown as Yes. The system administrator notices that a number of the named users are no longer with the sales organization. By deactivating the user IDs of these employees, the system administrator frees their user licenses.

When the company rolled out Siebel eSales for its customers, the system administrator configured the LicCustomerNotifyUH workflow. The eSales Web site is very popular. The system administrator monitors the daily usage of the Siebel eSales through the Concurrent Usage Monitor view. When he receives notification of usage violations, the company arranges to purchase additional concurrent-usage licenses.

Example Process Flows for License Tracking

Figure 8 illustrates the process flow for the business scenario, “[Business Scenario for License Tracking](#)” on page 188.

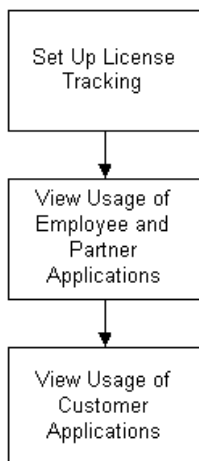


Figure 8. Example Process Flow for License Tracking Business Scenario

Setting Up License Tracking

There are two setup tasks for license tracking:

- [Configuring the Client Administration Server Components](#)
- [Configuring the Usage Exception Workflows \(Optional\)](#)

Configuring the Client Administration Server Components

License Tracking is off by default in your preconfigured Siebel application. The following procedures describe how to turn on License Tracking and how to configure License Tracking so that it is always turned on at restart.

To turn on (or turn off) Client Administration

- 1** From the application-level menu, choose View > Site Map > Server Administration > Servers.
- 2** Click the Server Components view tab.
- 3** For each server: in the Server Components list, select the Client Administration record and click Startup (or Shutdown).

To configure Client Administration to be on (or off) at restart

- 1** From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2** In the Components list, select the component named Client Administration.
- 3** Click the Component Parameters view tab.
- 4** Select the Default Tasks parameter, and set the Value on Restart to 1 (on at restart) or to 0 (off at restart).

Configuring the Usage Exception Workflows (Optional)

Two predefined workflow processes for email notification of license violations are provided with, but not activated in, your preconfigured Siebel application:

- **LicCustomerNotifyNU.** Configure the Email Recipient property and activate this workflow if you want to send email notification of named-user license violations to a designated email address.

- **LicCustomerNotifyUH.** Configure the Email Recipient property and activate this workflow if you want to send email notification of concurrent-usage license violations to a designated email address.

For information about activating workflows and editing process properties, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Viewing Usage of Employee and Partner Applications

The Named User Monitor view contains a usage history record for each Siebel application running. The usage history record shows a running total of all named users who have logged into the application. The total is initialized at zero and incremented each time a new user logs on.

The usage history record for each application has a set of user log records associated with it: one user log record for each user ID who has logged into the application.

License Tracking scans for login identifiers every 5 minutes. Any login IDs not previously encountered are added to the User Log list for the application.

When a user's login is deactivated, the user log record is automatically deleted from the Named User Monitor view. For information about deactivating employees, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.

To view named users

- 1 From the application-level menu, choose View > Site Map > Application Administration > Named User Monitor.
- 2 In the Usage History list, select the record for the application you want to review.

Some fields are described in the following table.

Field	Comments
Limit Exceeded?	Yes or No.
Application/Module	The name of the Siebel application being monitored, for example Siebel Sales.
# of Named Licenses	The number of named-user licenses purchased for the application.
# of Named Users	Total number of named users who have logged on to date. An exception is flagged when this number exceeds the # of Named Licenses.

- 3 In the User Log list, review the log records associated with the record selected in [Step 2](#).

Some fields are described in the following table.

Field	Comments
Login ID	User ID for login.
First Login	The first day and time the client logged into the application.
Last Login	The date and time of the user's most recent login.

Viewing Usage of Customer Applications

The Concurrent Usage Monitor view does not indicate the names of users because users of customer applications do not need to be registered. Instead, the maximum number of concurrent users per day is monitored.

The Concurrent Usage Monitor maintains daily usage records for each customer application for the past 180 days.

Tracking begins at 12 A.M. each day, and the number of users for each application is sampled every 5 minutes.

To view concurrent client usage

- 1** From the application-level menu, choose View > Site Map > Application Administration > Concurrent Usage Monitor.
- 2** Review the records in the Usage History list, and select a record where the Limit Exceeded value is Yes.

Some fields are described in the following table.

Field	Comments
Limit Exceeded?	Yes or No.
Peak Time	The time at which the peak number of users was measured.
Application/Module	The name of the Siebel application being monitored, for example Siebel eSales.
# of Concurrent Licenses	The number of concurrent-user licenses purchased for the application.
# of Peak Concurrent Users	The maximum number of concurrent users for that date.
Average # of Concurrent Users	The arithmetic mean of the 288 samples taken during the 24-hour day.

- 3 In the Usage Exceptions list, review the exception information associated with the record selected in [Step 2 on page 194](#).

Some fields are described in the following table.

Field	Comments
Time	The sample time when the number of concurrent users first exceeds the license limit.
Duration (minutes)	The exception period: the length of time (+/- 5 minutes) for which the number of concurrent users exceed the license limit.
# of Peak Concurrent Users	The maximum number of concurrent users measured during the exception period.

Correspondence 13

Siebel Correspondence allows employees and partners to generate correspondence from any location with access to the Web. It also makes it easy for them to direct correspondence to fulfillment centers that print and mail it, so they can produce and send correspondence even if they are on the road and do not have access to a printer.

For example, if salespeople want to do mass mailings to customers in cities where they are giving presentations, Siebel Correspondence allows them to log on from any location where they have Web access. Then they can create personalized form letters to invite customers in a specific city to a specific presentation, and direct these letters to be printed and mailed by a fulfillment center.

First, an administrator creates templates (which are similar to form letters) that employees and partners can use for their everyday correspondence. Then, employees and partners can automatically generate correspondence based on this template and on information in Opportunity and Account records.

This chapter describes how the administrator sets up Siebel Correspondence.

For information about how the end user generates correspondence, see *Siebel Sales User Guide, MidMarket Edition*.

System Requirements for the Web Client

To use Siebel Correspondence, you must have:

- Siebel Document Server, including Siebel Correspondence engine, installed on a Windows server. The document server can be installed during installation of the Siebel Server.
- Microsoft Office installed on the server.
- All of the components that are required to use Siebel 7.5 software installed on the server, such as a Siebel Server and a Web Server.

Siebel Correspondence uses the Document Server, a new component of the Siebel Server which lets users on the Web work with Word documents that are on the server.

Your employees or partners who use Siebel Correspondence need:

- A Web browser to use the product
- Optionally, Microsoft Word to edit documents

For information on the Web browsers that are supported, see *Release Notes*.

System Requirements for the Remote Web Client

Siebel Correspondence is available for the Siebel Remote Web Client as well as for the Siebel Web Client. The user interface for Correspondence is identical in the Remote Web Client and the Web Client.

However, the Remote Web Client processes requests to generate documents locally, so field sales representatives can generate correspondences while traveling.

To run Siebel Correspondence on the Remote client, you must have Microsoft Word installed on the same machine as the Remote Client.

Installing the Document Server

Siebel Correspondence uses the Siebel Document Server to generate Microsoft Word documents through the Web.

To install the Document Server, perform the following steps:

- Obtain the required hardware.
- Install the Siebel Server.
- Install third-party applications.

After installing the Siebel Server, you may have to follow some of the steps described in [“Configuring the Document Server” on page 201](#). The Document Server is a component of Siebel eDocuments, which can be installed during installation of the Siebel Server. Consult with your system administrator to verify that the Document Server has been installed and configured according to the requirements listed in the following sections.

Hardware Requirements

The Document Server is supported on the Windows 2000 and Windows XP platforms. To maintain stability and performance, the Document Server must run on a dedicated host machine. The Siebel Server on this machine should host one instance of the Siebel eDocuments component group. No other components should be running other than required system components.

To support more users, you can run additional instances of the Siebel eDocuments component group on additional dedicated host machines.

Installing the Siebel Server

Install the Siebel Server on the dedicated host machine of the Document Server. For more information about installing the Siebel Server, see *Siebel Server Installation Guide for Microsoft Windows, MidMarket Edition*.

During installation, you will have the option to enable component groups. Select the Siebel eDocuments component group. Do not enable any other component groups.

This step can also be performed after installation is complete, as described in the section [“Enabling the Component Group” on page 201](#).

Installing Third-Party Applications

You must install Microsoft Word.

To install Microsoft Office

- 1** Log on to the server machine using the same user account that the Siebel Server NT service uses. This user account must belong to the Administrators group.

NOTE: The install must use the same account to be used by the NT Service. The installer configures COM security settings so that the installing user account will have the correct permissions to access and launch the application. If the install uses an account other than the Siebel Server NT service account, errors may occur when the Document Server tries to launch the application.

- 2** Install Microsoft Office using a Typical, or complete, installation. Verify that your version of Microsoft Office will install the Web Authoring Tools (HTML) component with the Typical installation. If it does not, you will need to use the Custom installation option, and install all of the typical components as well as the Web Authoring Tools (HTML) component.
- 3** Start the applications that will be used by the Document Server. This forces the applications to register themselves.
- 4** Close the applications.

Configuring the Document Server

After finishing the installation steps, perform the following steps to configure the Document Server:

- Enable the component group
- Synchronize components
- Enable HTML generation (optional)
- Configure application recycle period (optional)
- Specify the target server (optional)
- Enable additional logging (optional)

Enabling the Component Group

If you have not already done so during installation, you must enable the component group named Siebel eDocuments. This group contains the DocServer component, which generates Correspondence. For more information about enabling this group, see *Siebel Server Administration Guide, MidMarket Edition*.

Synchronizing Components

This step is not specific to the Document Server, but is a required post-installation step for the server infrastructure. For information about synchronizing components, see *Siebel Server Administration Guide, MidMarket Edition*.

Enabling HTML Generation (Optional)

By default, correspondence is only saved in document format, not in HTML format. The user's View HTML button is unavailable, and the user cannot view the correspondence in HTML format.

The server parameter `DocumentServerViewHTML` specifies whether the Document Server generates HTML versions of documents. The default value is `FALSE`. By default, the Document Server only generates documents in their native format, and not in HTML. To allow the user to display correspondence in HTML format, you must edit the parameter `DocumentServerViewHTML` to give it the value `True` instead of `False`. Any documents generated after the parameter is enabled is saved in both formats.

When you generate HTML documents, a copy of the generated document is created in HTML and stored in the Siebel File System. This may affect performance, and it will increase the storage space required in the File System. The clarity of the HTML document depends on your Office application's ability to translate its native format into HTML.

Entering the following command allows generation of HTML versions of Correspondence.

To enable generation of HTML versions of documents

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

```
Srvrmgr> change param DocumentServerViewHTML=True for comp  
DocServer
```

NOTE: While this procedure uses the Server Manager, parameters can also be changed using the Server Administration interface. For more information, see the *Siebel Server Administration Guide*.

Configuring Application Recycle Period (Optional)

You use the parameter `MSWordLiveCount` to control how often the office applications are restarted.

Each parameter can be set to a positive integer that specifies the number of documents to be processed before it shuts down and restarts the corresponding office application. A value of 0 (the default) indicates that the applications will not be shut down. If the parameter value is set to any integer other than 0 and the Document Server fails to launch, the corresponding application will be shut down and then restarted again.

To change the values of these parameters

- 1 Start the Server Manager.
- 2 To change the application recycling period for Microsoft Word, which is used by Correspondence, enter the command:

```
Srvrmgr> change param MSWordLiveCount=5 for comp DocServer
```

Specifying the Target Server (Optional)

If you are running multiple Document Servers within the same enterprise, then the server infrastructure will route document requests to different Document Servers in order to achieve load balancing.

However, it sometimes may be useful to specify that all requests be routed to one Document Server. For example, you can do this to help diagnose a server problem.

To route all requests to one document server

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

```
srvrmgr> change param DocumentServerName=DocSrvr1
```

Enabling Additional Logging (Optional)

Optionally, you may want to enable additional logging, which can be helpful for debugging.

The event logging system writes events to the log file based on the log level for each event type. The number you specify indicates the filtering level for logging. The default value is 3, which means that events with a level of 1, 2, or 3 will be logged, while events with a level of 4 or 5 will be suppressed. Setting the filtering level to 5 means that all events will be logged.

NOTE: In the final command on the list, the parameter must be in quotation marks, because it has a space in it. In the other commands, quotation marks are optional and are not included in the list.

To enable additional logging

1 Start the Server Manager.

2 Enter the following commands:

```
srvrmgr> change evtloglvl GenericLog=5 for comp Docserver
srvrmgr> change evtloglvl ProposalDebug=5 for comp Docserver
srvrmgr> change evtloglvl ProposalDetail=5 for comp Docserver
srvrmgr> change evtloglvl PresentationDebug=5 for comp Docserver
srvrmgr> change evtloglvl PresentationDetail=5 for comp DocServer
srvrmgr> change evtloglvl DocServerDebug=5 for comp DocServer
srvrmgr> change evtloglvl DocServerDetail=5 for comp DocServer
srvrmgr> change evtloglvl CorrespDebug=5 for comp DocServer
srvrmgr> change evtloglvl CorrespDetail=5 for comp DocServer
srvrmgr> change evtloglvl MSProjectDebug=5 for comp DocServer
srvrmgr> change evtloglvl "MS ProjectDetail"=5 for comp DocServer
```

For more information about event logging, see *Siebel Server Administration Guide, MidMarket Edition*.

About Working with Correspondence Templates

Siebel correspondence templates are created and edited in Microsoft Word (DOC file format). Templates contain fixed text and one or more merge field. The merge fields are placeholders that will be populated with variable information from your Siebel database, such as a Contact's name and address, when users generate a correspondence for one or more recipients.

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

The fixed text of each correspondence template is written using specific locale conventions and language. In order to support Global Deployment, the author of the template can explicitly indicate the locale and language using the Locale and Language fields in the template record. The Document Server then uses these settings to substitute correctly localized data into the mailmerge fields of the template. The following types of fields are affected:

- MLOV fields
- Global data fields
- Locale-sensitive fields, such as dates and currencies

The data source for Word merge fields that are available to be included in Siebel correspondence templates is in the Siebel.html file. Administrators can augment the set of merge fields available using Siebel Tools. For information, see [“Configuring Additional Merge Fields” on page 217](#).

Guidelines for working with correspondence templates include the following:

- One correspondence must be generated before the Siebel.html file will appear for the first time. In most cases, the first generated correspondence template will be one of the Siebel sample templates. Once the Siebel.html file appears, you can use it to create custom templates.
- A template must contain at least one merge field in order to generate a correspondence.
- Each time a user clicks Generate or Generate Label, the Siebel.html file is overwritten.

- Each time a user clicks Generate or Generate Label, the variable data in the data file replaces the merge fields in the Siebel.html file, based on the template format chosen, and a customized correspondence document is created for each recipient on the list.
- Check the status of the document or label by clicking the Update button and reviewing the Document Status field. See [Table 15](#).

Table 15. Document Status Field

Status	Meaning
In Queue	Request sent to available document server.
Generating	Document server is creating the Word merge document.
Completed	Document is available and can be accessed from the Generated Document field.
Failed	Document server encountered errors. Check the Document Error and Label Error fields for error messages.

- It is recommended that you make the template inactive prior to modifying it. You make the template inactive by deselecting the Active field. This will prevent other users from attempting to create correspondences using this template at the same time you are modifying it. After you have finished your modifications, check the Active field again.
- The Siebel.html file is located in the Reports subdirectory on the Siebel Server.

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

For information about which versions of Microsoft Word are supported, see *Release Notes* and *Siebel System Requirements and Supported Platforms* for your Siebel application.

Using the Sample Correspondence Templates

You should change the text in the sample correspondence templates packaged with Siebel Correspondence to add text that is specific to your company and business.

You may want to change both the text and the merge fields of these sample correspondence templates.

Changing the Text of a Correspondence File

If you only want to modify the text of a correspondence template, you can simply drill down on the template link in Siebel Correspondence to open it and then edit it in Microsoft Word.

NOTE: Be careful not to change the merge fields when you edit the text.

To change the text of a correspondence template file

- 1** From the application-level menu, choose View > Site Map > Document Administration > Correspondence Template.
- 2** In the Templates list, drill down on the Template Name hyperlink.
A dialog box appears asking whether you want to open the file or download it.
- 3** Select Open this file from its current location, and click OK.
The template file appears in Microsoft Word.
- 4** Edit the text using Microsoft Word.
- 5** Choose File and then click Save to save the changes when you are finished.
- 6** In the template list, click the icon appearing in the Template Name field.
- 7** Click Browse.
- 8** Navigate to the saved template and select the file.
- 9** In the Add Attachment dialog box, click Add.

Changing the Merge Fields of a Correspondence Template File

The easiest way to change the merge fields in a correspondence template file is to use the Mail Merge feature of Microsoft Word together with the Siebel.html file generated by the Document Server. The siebel.html file contains the names of the fields that are available for merging. After Microsoft Word reads this file, the fields can be selected from a drop-down menu.

To change the merge fields of a correspondence template

- 1 In the Correspondence Template list applet, drill down on the Template Name field and select the template you want to modify.
- 2 In the displayed dialog box, select *Open this file from its current location* and click OK.

The template file appears in Microsoft Word.

- 3 Add merge fields to the template file. (See either [“To add merge fields to the template in Microsoft Word 2000”](#) or [“To add merge fields to the template in Office XP.”](#))
- 4 In the template list, click the icon appearing in the Template Name field of the template you are modifying.
- 5 Use the Add Attachment dialog box to upload the modified template file.

To add merge fields to the template in Microsoft Word 2000

- 1 In Microsoft Word, choose Tools, and then Mail Merge.

The Microsoft Word Mail Merge Helper window appears.

- 2 In the Mail Merge Helper window under the Main Document heading, click the Create button and choose Form Letters.
- 3 In the dialog box that appears, click the Active Window button.
- 4 In the Mail Merge Helper window under the Data Source heading, click the Get Data button and choose Open Data Source.

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

NOTE: The Siebel.html appears only after the first correspondence template is generated.

- 6 Click the Close button to dismiss the Mail Merge Helper window.
- 7 If the template file does not yet have merge fields, an information box states this. Click Edit Main Document in the box.

If the template file already contains merge fields, no box appears. Click the Close button to close the window.
- 8 When you are finished adding merge fields, click the Mail Merge Helper icon on the Mail Merge Tool bar. In the Mail Merge Helper window, click Create and choose Restore to Normal Word Document. Click Yes to continue.
- 9 Close the Mail Merge Helper window.
- 10 Choose File > Save As and save the file on your hard drive, with a new name.
- 11 Close Microsoft Word.
- 12 In the template list, click the icon in the Template Name field of the template you are modifying.
- 13 Use the Add Attachment dialog box to upload the modified template file.

To add merge fields to the template in Office XP

- 1 In Microsoft Word, choose Tools > Letter and Mailings > Show Mail Merge Tool bar.
- 2 In the tool bar, click Main Document Setup.
- 3 In the Main Document Type window, select Letters and click OK.
- 4 On the Mail Merge Tool bar, click the Open Data Source icon.
- 5 In the Select Data Source window, locate and open the \Siebel\Reports\Siebel.html file.

- 6** In the Select Table window, click OK.
- 7** Edit the text and add merge fields. For each merge field, position the insertion point at the desired location in the template, click the Insert Merge Fields icon, and choose the merge field from the menu.
- 8** When you have finished adding merge fields, click the Main document setup icon on the Mail Merge tool bar.
- 9** In the Main Document Type window, select Normal Word Document and click OK.
- 10** Choose File > Save As and save the file on your hard drive with a new name.
- 11** Close Microsoft Word.
- 12** In the template list, click the icon in the Template Name field of the template you are modifying.
- 13** Use the Add Attachment dialog box to upload the modified template file.

Creating a New Correspondence Template

To add a correspondence template, it is easiest to modify and rename an existing template. The following three procedures step you through this process, in which you:

- Open an existing template file.
- Modify and rename the template in Microsoft Word.
- Add a template record for the new file in Siebel Correspondence.

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

Opening an Existing Template File

To prepare to create a new template, you must drill down on the template link in Siebel Correspondence to open an existing template file.

To open an existing template file

- 1** From the application-level menu, choose View > Site Map > Document Administration > Correspondence Templates.
- 2** In the Templates list, drill down on the Template Name hyperlink.

A dialog box appears asking whether you want to open the file or download it.

- 3** Select Open this file from its current location, and click OK.

The template file appears in Microsoft Word.

Modifying and Renaming the Template

Now that the file has been displayed in Microsoft Word, you use Word's mail merge features to modify its merge fields and then save it under a different name. To modify merge fields, see [“Changing the Merge Fields of a Correspondence Template File.”](#)

Adding a Correspondence Template Record for the New File

Once you have created a new correspondence template in Word, you need to add a record in your Siebel application so your users can access the Word file as a template. Users will see the template in the Template field in the My Correspondence Requests view.

To add a template record

- 1 From the application-level menu, choose View > Site Map > Document Administration > Correspondence Templates.
- 2 In the Templates list, add a new record.
- 3 In the Template Name field, click the select button.
- 4 Click Browse.
- 5 Select the new file and then click Open.
- 6 When the Add Attachment dialog box appears displaying the name of the selected file, click Add.

The file name is added in the Templates view tab, and some other fields are populated automatically.

- 7 Make sure that the Active field is checked.
- 8 Optionally, complete the other fields described in the following table.

Field	Comments
Active	Indicates whether or not the template appears in the Template list in the My Correspondence Requests view.
Update File	A check mark in this field indicates that users want their copy of the template to be updated automatically each time the original file is updated.
Comments	A description, and information about the template.

Field	Comments
Local	Indicates whether or not the template is available on the local hard disk. If a document is not available locally, you can request it by selecting the Request field. The file will be downloaded in your next synchronization session. This field applies to you only if you use Siebel Remote.
Modified	The date that the template file was last modified.
Template Name	The name of the file. Required.
Personal	A check mark in this field specifies that the template will appear in the Personal Template view.
Download File	Allows users to request templates from the server. When a check mark appears in this field, the document is retrieved during the next synchronization session. This field applies to you only if you use Siebel Remote.
Size	The size of the template file.
Type	The file type of the template file.
Language	The language used by the Document Server to render mail merge fields based on MLOV and Global Data Business Component fields. For more information on these types of fields, see <i>Siebel Tools Reference, MidMarket Edition</i> .
Locale	The locale used by the Document Server to render mail merge fields based on locale-sensitive business component fields, such as dates and currencies. For more information on these types of fields, see <i>Siebel Tools Reference, MidMarket Edition</i> .

Deleting a Template

If a template is no longer valid, it you may want to delete it so that no one uses it by mistake.

To delete a template

- 1** From the application-level menu, choose View > Site Map > Document Administration > Correspondence Templates.
- 2** In the Templates list, select the template to be deleted.
- 3** Click the menu button, and then click Delete Record.
- 4** When the “Are you sure you want to delete the current record?” prompt appears, click OK.

The Templates List refreshes and appears without the deleted template.

Inserting Files into Correspondence Templates

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

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

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

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

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

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

To insert a file into a correspondence template

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

`[[File Name]]`

Here, *File Name* is the name of the file created in [Step 1](#).

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

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

Configuring Additional Merge Fields

During the document generation process, the Document server exports mail merge data into the Siebel.html file. Microsoft Word then reads this file and inserts the data into the merge fields in the template. The exported data is taken from two places:

- If the correspondence was created from a view based on service requests (such as the Service Request screen in Siebel Sales or the Service screen in Siebel Call Center), the data is taken from the Service Request Recipient business component.
- If the correspondence was created by pressing the New button in the Correspondence list view, or from a view not based on service requests (such as the Opportunity screen), the data is taken from the Recipients business component.

New fields in the Recipients Business Component are restricted to those based on columns in the S_CONTACT table or those obtained through join relationships. Joins can be added for tables that have a master-detail relationship with S_CONTACT, where S_CONTACT is the detail table. You need to add the join to the Recipients Business Component if it does not already exist.

New fields in the Service Request Recipient Business Component are restricted to those based on columns in the S_CONTACT table, the S_SRV_REQ table, or columns available through joins to these tables.

Table 16 summarizes the contents of the two Business components and the contexts in which they are used. For more information on adding fields, see *Developing and Deploying Siebel eBusiness Applications, MidMarket Edition* and *Siebel Tools Reference, MidMarket Edition*.

Table 16. Summary of Merge Fields Sources and Uses

Source Business Component	Source Tables	Used In
Recipients	<ul style="list-style-type: none">■ S_CONTACT■ Joins with tables that have a master-detail relationship with S_CONTACT (with S_CONTACT as the detail table).	Correspondence created: <ul style="list-style-type: none">■ Directly in the Correspondence List View■ From any view not based on service requests
Service Request Recipient	<ul style="list-style-type: none">■ S_CONTACT■ S_SRV_REQ■ Joins with tables that have a master-detail relationship with one of these two (with S_CONTACT or S_SRV_REQ as the detail table).	Correspondence created from views based on service requests.

To configure an additional merge field

- 1 Open Siebel Tools.
- 2 Add the new field to either the Recipients Business Component or the Service Request Recipient Business component. The steps for this depend on the field type you are adding. For more information on adding fields, see *Developing and Deploying Siebel eBusiness Applications, MidMarket Edition* and *Siebel Tools Reference, MidMarket Edition*.
- 3 Add the name of the new field to the Business Component User Prop called “Export Field #”, where # is an integer. If necessary, create additional user properties by incrementing the integer.
- 4 Compile the project to create a new .srf file.
- 5 Stop the server.

- 6** Copy the newly compiled .srf file to the correct location where it will be used by the server (usually \siebel\objects\lang, where lang is the language code for the language setting of the server).
- 7** Restart the server.
- 8** Generate a new correspondence document to refresh the siebel.html file.
- 9** To insert fields into a template, see [“Changing the Merge Fields of a Correspondence Template File.”](#)

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

About Fulfillment Centers

When your users have completed correspondence and want to send it to the recipient, either they can print out and mail the letter themselves, or they can direct their correspondence to a fulfillment center that prints and mails it for them. A fulfillment center might be a division of your company, such as your marketing department.

You might want to use a fulfillment center for several reasons:

- To let your users produce correspondence in any location where they can access the Internet, even if they do not have a printer.
- To save your users time, since they do not have to print out and mail their correspondence.
- To create consistency in your company's outgoing correspondence.
- To allow one location to fulfill all requests for collateral and literature materials included with correspondence as enclosures.

If you have set up fulfillment centers, the user can generate correspondence and then click Submit to submit the correspondence for fulfillment. When the user clicks Submit, the Status Field of the correspondence request is given the value Submitted, and the request is made read-only. You cannot make any further changes in it without using the Recall command.

Setting Up Fulfillment Centers

To set up a fulfillment center, you perform the following tasks:

- Add a fulfillment center record.
- Give the fulfillment center access to Siebel Correspondence.

Adding, Modifying, and Deleting Fulfillment Center Records

You must create one or more fulfillment center records, so users can select a fulfillment center when they create a correspondence request.

To add a fulfillment center

- 1** From the application-level menu, choose View > Site Map > Data Administration > Fulfillment Centers.
- 2** In the Fulfillment Centers list, click the New button.
- 3** Enter the information described in the following table.

Field	Description
Name	Enter the name of the fulfillment center.
Main Phone #	Enter the telephone of the fulfillment center.
Main Fax #	Enter the fax number of the fulfillment center.
Fulfillment Team	<p>Click the select button, and use the Fulfillment Team dialog box to select one or more employees at the fulfillment center. If necessary, click New to add employees to this dialog box. After you have selected the employees, click Close.</p> <p>These people will be able to view correspondence submitted to this fulfillment center. If there is no one on a fulfillment team, no one will be able to see correspondence submitted to this fulfillment center.</p>
Description	Enter a description of the fulfillment center.

To make other changes

- To modify a fulfillment center record, select a field and change the information.
- To delete a fulfillment center record, select the record, click the menu icon, and then click Delete Record.

Giving the Fulfillment Center Access to Siebel Correspondence

The fulfillment team at the fulfillment center must monitor pending fulfillment requests. Everything submitted by a requestor is visible to the fulfillment team in the Fulfillment screen.

Fulfillment center employees fulfill the request by viewing and printing the correspondence request and including the enclosures listed. The fulfillment center employees may either print the enclosure, or get an already-printed copy (if the enclosure is a glossy brochure, for instance).

If you have licensed Siebel Workflow, you can create a workflow to send email to the fulfillment center automatically whenever there is a new request for it to fulfill.

To give the fulfillment center access to Siebel Correspondence

- 1** Set up fulfillment center employees as Siebel Correspondence users, in the same way that you set up your own employees or your channel partners as Siebel Correspondence users. For more information about setting up users of Siebel applications, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.
- 2** Give fulfillment center employees a responsibility that lets them see the Fulfillment screen. Use the responsibility in the seed data named Fulfillment Center Employee. For more information about responsibilities, see [Chapter 2, “Initial Setup.”](#)
- 3** Tell fulfillment center employees what URL they should use to view Correspondence through the Internet.

About Monitoring Fulfillment

After they have processed a request, the fulfillment center employees click Done. Clicking Done updates the Status Field of the request to Done, and it creates an activity for each recipient indicating that correspondence has been sent.

Users monitor the status of their correspondence requests by looking at the entry in the Status column of the My Correspondence Requests view to see if the status is Done.

Similarly, a fulfillment center manager monitors the status of pending requests by looking at the entry in the Status column of records in the Fulfillment screen.

About Batch Printing

Batch printing simplifies the task of printing multiple correspondence items. The user first selects one or more Correspondence items, and then selects the Print option from the applet level menu. The documents are then printed on the appropriate printer.

Siebel applications support two types of batch printing, server-based and client based. Initially, the print menu item appearing on the Correspondence and Fulfillment screens is configured to perform client-based printing. However, the Administrator can use Siebel Tools to reconfigure these menus to use server-based batch printing, either in addition to, or instead of, client-based batch printing.

Client-Based Batch Printing

When a user prints a document using client-based batch printing, the Siebel application launches Microsoft Word on the user's client system. It then retrieves the document from the Siebel File System and prints it to the default printer configured for the user's desktop session.

For this feature to work correctly, the end user must configure the browser to allow the Siebel application to launch Microsoft Word. This requires changing the security option called "Initialize and script ActiveX controls not marked safe" to either *Enable* or *Prompt* for the security zone containing the Siebel application URL. Typically, this is either the "Local intranet" zone or the "Trusted" zone. Users should verify that any other URL in this zone can be trusted with this security privilege.

Server-Based Batch Printing

When a user prints a document using server-based batch printing, a request is sent to the DocServer server component. This component then prints the document to the printer specified by the user in User Preferences. If the user has not specified a preference, the document is printed on the default printer configured on the DocServer machine by the System Administrator.

Setting Up Batch Printing for Administrators and Users

Table 17 lists procedures for setting up batch printing for both administrators and users. Administrators need to set up server-based batch printing; users need to set up both server-based and client-based batch printing.

Table 17. Procedures for Setting Up Batch Printing

Setup Procedures for Administrators	Setup Procedures for Users
Add server Print menu items on the Correspondence and Fulfillment screens	Verify system requirements for client-based batch printing
Set up the printer configuration	Configure Internet Explorer to permit client-based batch printing
Add a printer connection to the DocServer machine	Add a printer connection to the desktop for client-based batch printing
Change the default printer (if necessary)	Change the default printer (if necessary)
	Specify a printer for server-based batch printing

Batch Printing Instructions for the Administrator

As an administrator, you need to set up the server-based batch printing function.

To add server Print menu items on the Correspondence and Fulfillment screens

- 1** Start Siebel Tools.
- 2** In the Object Explorer window, under Siebel Objects, select Applet.
- 3** In the Applets window on the right, enter “Correspondence List Applet” in the Name column and click Query.
- 4** In the Object Explorer, select Applet Method Menu Item.
- 5** In the Applet Method Menu Item window, enter “Server Printer” in the Menu Text column and click Query.
- 6** Highlight the record and uncheck the Inactive check box in the Inactive column.
- 7** In the Applet Method Menu Item window, enter “Server Print Label” in the Menu Text column and click Query.
- 8** Highlight the record, and deselect the Inactive check box in the Inactive column.
- 9** In the Application menu, click Tools and select Compile Projects. In the Project Selection window, pick project “Corresp (SSE)”.
- 10** Browse and select the appropriate siebel.srf file, and click Compile.
- 11** Repeat [Step 3](#) to [Step 10](#) for the Fulfillment screen, querying for “Fulfillment List Applet” in the Applet window.
- 12** Verify that “Server Printer” and “Server Print Label” menu items appear in the applet menus of the Correspondence and Fulfillment screens.

Configuring Printers for Server-Based Batch Printing

When a user invokes server-based batch printing on a correspondence document, a request is sent to the DocServer component. This request contains the values for the Default Printer and Printer Driver preferences the user has selected on the Correspondence User Preference screen. After receiving the request, DocServer uses Microsoft Word to convert the document into a PostScript file. The style of PostScript generated is determined by the value for the Printer Driver user preference. This parameter specifies the name of a network printer. The PostScript file generated by Microsoft Word is suitable for this printer and all other printers of the same model. After the PostScript file is generated, DocServer sends the file to the printer specified in the Default Printer user preference.

As an administrator, you need to complete the following tasks to support server-based batch printing.

- 1** Identify the printer models within your enterprise that will be used for server-based batch printing.
- 2** For each model, select one network printer and add a printer connection to it on the DocServer machine.
- 3** Designate one configured printer as the default printer for the DocServer machine.
- 4** Provide the list of configured printers to end users, who will use this list to select a Printer Driver in User Preferences.

For example, an organization has five Xerox Model A printers, named xrx001 to xrx005, and five Canon Model B printers, named cnn001 to cnn005. A printer server named hqsrvr is used to route requests to all of the printers. The administrator decides to use xrx005 to represent the Xerox Model A printers and cnn005 to represent the Canon Model B printers, then adds printer connections on the DocServer machine for each. The xrx005 printer is chosen as the default printer. These connections are used by the DocServer component to generate PostScript files. Only one printer for each model is actually configured on the DocServer machine. After creating the printer connections, the administrator notifies the end users of the network names of the configured printers (in this case: \\hqsrvr\xrx005 and \\hqsrvr\cnn005).

Continuing the example, a user now wants the cnn003 printer for her personal batch printing requests. To do this, she goes to the User Preference Screen, Correspondence View and enters \\hqsrvt\cnn003 in the Default Printer field and \\hqsrvt\cnn005 in the Printer Driver field. All subsequent batch printing requests she submits are sent to the cnn003 printer.

If a user does not specify a User Preference, batch printing requests submitted by that user are sent to the default printer configured by the administrator on the DocServer machine.

To add a printer connection to the DocServer machine

- 1** Login to the DocServer machine using the same User ID used by the Windows Service running the Siebel Server.
- 2** Select Start > Settings > Printers.
- 3** Double click the Add Printer icon.
- 4** On the Welcome screen, click Next.
- 5** On the Local or Network Printer screen, select Network Printer and click Next.
- 6** On the Locate Your Printer screen, select Network Printer and click Next.
- 7** On the Default Printer screen, select either Yes or No and click Next.
- 8** Click Finish.

To change the default printer

- 1** Login to the docServer machine using the same User ID as used by the Windows Service running the Siebel Server.
- 2** Navigate to Start Menu > Settings > Printers.
- 3** In the printer list, right click on the desired printer and choose Set as Default.

Batch Printing Instructions for the End User

To batch print, you select correspondence items and then select the Print option from the applet menu. The Print menu item is active only if all selected correspondence records have a value of Completed in the Document Status column.

Initially the Print menu item on the Correspondence and Fulfillment screens is configured to perform client-based printing. However, your administrator can configure server-based printing in addition to, or instead of, client-based printing.

Using Client-Based Batch Printing

When you use client-based batch printing, the Siebel application launches Microsoft Word on your client system. It retrieves the document from the Siebel File System and prints it to the default printer configured for your desktop session. To use this feature, you need the following:

- Microsoft Word must be installed on the client system.
- Internet Explorer must be configured to launch Microsoft Word.
- The default printer must be configured for your desktop.

To configure Internet Explorer to allow client-based batch printing

- 1** Start Internet Explorer and log on to the Siebel application.
- 2** In the Internet Explorer, select Tools > Internet Options.
- 3** Select the Security Tab. The security zone used by Siebel applications is highlighted (either Local intranet, or Trusted). Verify that any other URL in this zone can be trusted with extra security privileges.
- 4** Select Custom Level.
- 5** In the Security Settings dialog box, find “Initialize and script ActiveX controls not marked safe.” Change the setting to either Enable or Prompt.
- 6** Click OK.
- 7** To the question, “Are you sure you want to change the security for this zone?” click Yes.

- 8** In the Internet Options dialog box, click OK.

To add a printer connection to your desktop

- 1** Select Start Menu > Settings > Printers.
- 2** Double-click the Add Printer icon.
- 3** Click Next on the Welcome screen.
- 4** On the Local or Network Printer screen, select Network Printer and click Next.
- 5** On the Locate Your Printer screen, select Type the Printer Name and either type the network name of the printer, or click Browse and select the printer.
- 6** Click Next.
- 7** On the Default Printer screen, choose either Yes, or No. Click Next.
- 8** On the Completing the Add Printer Wizard screen, click Finish.

To change the default printer

- 1** Select Start Menu > Settings > Printers.
- 2** The current default printer is marked with a check. To select a new default printer, right click on the desired printer and choose Set as Default.

To print documents using client-based printing

- 1** From the application-level menu, choose View > Site Map > Correspondence or Fulfillment.
- 2** Close any Word files.
- 3** Select one or more rows in the Correspondence List Applet. All selected rows must have a Document Status of Completed.
- 4** In the applet menu, select Print.

The selected documents are printed to the configured default printer.

Using Server-Based Batch Printing

Server-based batch printing sends a printing request to the Siebel Document Server. The document is then sent to the printer specified in User Preferences. If you do not specify a printer, the document is printed on the default printer configured by the System Administrator.

To specify a printer for server-based batch printing

- 1 From the application-level menu, choose View > Site Map > User Preference > Correspondence.
- 2 In the Default Printer field, enter the network name of the printer used for Correspondence. The network name should contain both the printer server name and the printer name as follows:

\\printer_server_name\printer_name

- 3 In the Printer Driver field, enter the name of the printer driver used to generate an intermediate file during the printing process. The System Administrator should provide you with a list of printer drivers and their associated printer types. Select the Printer Driver associated with the printer you previously specified in [Step 2](#).
- 4 Click Save.

To print documents using server-based printing

- 1 From the application-level menu, choose View > Site Map > Correspondence or Fulfillment.
- 2 Select one or more rows in the Correspondence List Applet. All selected rows must have a Document Status of Completed.
- 3 In the applet menu, select Print.

The selected documents are printed to the default printer specified in User Preferences.

Correspondence

Batch Printing Instructions for the End User

Literature 14

Siebel Literature allows you to give your users access to sales and marketing literature, such as product brochures, white papers, data sheets, and other types of literature items. Users view these documents using the application that created them, for example, Microsoft Word, Lotus Word Pro, or Adobe Acrobat.

Literature items may also be grouped into literature kits. Literature kits may include items not normally thought of as literature, such as promotional hats, coffee mugs, or T-Shirts. These kits may then be made available for distribution through fulfillment centers. Literature kits are covered later in this chapter. Fulfillment is covered in [Chapter 13, “Correspondence.”](#)

After you create literature records and associate documents with them, your employees can use literature in several ways:

- Employees can use the Literature or Infocenter Explorer to search through all the literature that is available to them.
- You can associate literature with business objects such as products or competitors. Then users can display the literature when they are looking at the record for the associated business object. For example, the user can navigate to the Product screen, select a product, and click the Product Literature view tab to find all literature items associated with that product.
- When your employees use the Correspondence screen to create correspondence, they can include literature as enclosures. The user or fulfillment center may print out this literature document, or it may use preprinted copies of literature such as glossy brochures. It may also enclose promotional items that are parts of literature kits.

About Setting Up Literature Files

To set up a literature file, you must

- Create the document in another program
- Add a Literature record that includes the document in your Siebel application

NOTE: You may want to create a literature record without associating a document with it. For example, if the record represents an item such as a hat or cup, which is part of a literature kit, you need not associate a document with it.

Creating and Modifying Literature Files

Literature files can be created or saved using many kinds of software. The following file types are among the most common:

- Adobe Acrobat (.pdf)
- Excel (.xls)
- Word (.doc)
- PowerPoint (.ppt)
- Bitmap (.bmp)
- JPEG (.jpg)

To create a new literature file

- 1** Create a literature file in the appropriate software application.
- 2** Save the file on your hard drive.

To modify an existing literature file

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** Click the literature file that you want to modify.

Information about the file is displayed in the More Info form. You can use this form to change existing comments or characteristics; for example, Distribution Method.

The actual literature file opens in the type of tool that was used to create it; for example, Word.

- 3** Modify the file, and save it locally.
- 4** Upload the modified file to the existing Literature record.

Adding Literature Records

After you have created a literature file, you need to create a literature record in the Siebel database, in order to make the file available to Siebel applications users.

To add a literature record

1 From the application-level menu, choose View > Site Map > Document Administration > Literature.

2 In the Literature list, add a record and attach the literature file.

The new file is added to the available literature. Appropriate information is displayed in the Literature list and the More Info form.

3 Enter the rest of the information required in the Literature list blank row and the More Info form of the new record. The following table briefly describes each field in the view.

Field	Comments
Name	Enter a name for the literature record.
Description	Enter a description of the document. Because literature items can be in any language, you may want to indicate the language of the item in this field (or in the Name field).
Literature Type	Select the type of the literature. You can create new literature types in the List of Values Administration view. Because the Literature Type field is used to filter literature items in various applets (by setting the Search Specification property for the applet in Siebel Tools), you should be careful when editing the Literature Type field.
Size	The size of the literature file. The information is automatically entered based on the size of the file that you select.
File Type	The file type of the literature file, for example DOC or PDF. The information is automatically entered based on the type of the file that you select.
Modified	The date that the literature file was last modified. The information is automatically updated whenever the file is updated.

Field	Comments
Update File	A check mark in this field indicates that users' copies of the literature will be updated automatically each time the original file is updated.
File	Click Browse and, in the Choose File dialog box, select the document file. You can also enter the file name manually. Required.
Synopsis	Optionally, enter a synopsis of the document's content.
Author	Optionally, click the select button and select the document's author.
Accounts	Select accounts with which the literature is associated.
Competitors	<p>Select competitors with which the literature is associated. Use this field to allow the user to display the literature using the Competitors screen.</p> <p>If you also select the Internal field, this literature will be displayed in the Comparative Literature view of the Competitors screen. If you do not select the Internal field, this literature will be displayed in the Competitor's Literature view of the Competitors screen.</p>
Internal	<p>Select this field if the document is internally sensitive and not intended for public distribution.</p> <p>If Internal is selected, the literature will not be available as an enclosure in the Correspondence screen, and it will be displayed in the Comparative Literature list of the Competitors screen.</p> <p>If Internal is not selected, the literature will be available as an enclosure in the Correspondence screen, and it will be displayed in the Competitive Literature list of the Competitors screen.</p>
Local	For users of the Remote Client, this field specifies whether the document is available on the local File System. If a document is not available locally, the user can request it by selecting the Request field.
Request	For users of the Remote Client, if this check box is selected, the literature will be downloaded during each synchronization session.

Field	Comments
Distribution Method	<p>Use this drop-down list to specify whether or not the file is automatically downloaded to users of the Remote Client.</p> <p>Publish: During each synchronization session, if your user does nothing, the file is downloaded automatically. If your user explicitly skips the file, the file is not downloaded in that synchronization session.</p> <p>By Request: During synchronization, the user receives the record, but not the actual file. To receive the file, the user must select the Request field.</p>
Industries	Select any industries associated with the literature.
Products	Select any products associated with the literature. Use this field to allow the user to display the literature using the Products screen.
Organization	Select organizations that will have visibility to this data. Required.

Adding Translation Records

Translated literature files can be created using any of the previously listed software tools. (See [“Creating and Modifying Literature Files.”](#)) You can create a record in the Siebel application for any translated file associated with your document.

To associate a translated document with a literature record

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** In the Literature list, select an existing record.
- 3** Click the Translations view tab.
- 4** In the Translation list, add a record and attach the translated document.

Make sure that the file name clearly indicates that this is the translated file.

Adding Literature Item Kits

After you have created more than one literature file, you can combine individual files and other material to create literature item kits. This feature allows you to combine individual literature items into groups, so you can work with the group instead of with the individual files. Literature item kits are used only as enclosures in correspondence.

For instance, you might have a set of literature items for prospective customers, including promotional brochures for your most popular products. You might also include items that are not documents: for example, a promotional kit for one of your products might include a brochure, a specifications sheet, a coffee cup, and a T-shirt.

Creating a literature item kit makes it easier to send this information out. When the user adds an attachment to correspondence, the user only has to select one literature item kit instead of all the individual items. Then the fulfillment center can mail all the items with the correspondence.

When you create a literature item kit, you create a Literature record that represents the entire kit, and you associate Literature Item records with it that represent the items in the kit. The fulfillment center can view the Literature record, but cannot view the Literature Item records. To let the fulfillment center know which items make up the kit, you can:

- **Pack kits together at the fulfillment center.** For example, you have a kit named Sales Promo that includes a brochure and a hat. The brochure and hat might be shrink wrapped together at the fulfillment center or they might be stored in one bin at the fulfillment center, so the fulfillment center can select one of each item in the bin. Then, when the fulfillment center sees that they must fulfill the Sales Promo literature record, they would mail out this shrink-wrapped package or the items from this bin.

- **Make the Literature record a bill of materials.** You can include a document in the Literature record that describes all the Literature Items in the kit, or use the Literature records Description or Synopsis field to list all the Literature Items in the kit. For example, if the kit consists of a sales brochure and a hat, you would create a Literature record that represents the entire kit, you would attach two Literature Item records to it that represent the brochure and the hat, and you might also use the description field of the Literature record to say the kit includes a brochure and a hat. Then the fulfillment center would read the description field and mail out the items listed.

To add a literature item kit

- 1 From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2 In the Literature list, add a new record, or select an existing record. This record represents the literature item kit, so you should give it a name that indicates the kit contents.
- 3 Click the Literature Items tab.

The fields previously displayed in More Info are shown under the Literature list at the top. The fields in the Literature Items list, in the middle of the view, display specific item information. The Component Items list appears at the bottom of the view.

- 4 In the Literature Items list, add a record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Primary	Indicates whether this is the primary item in the kit.
Physical Form	A description of the item's physical form. This field supports multiple values to allow for multiple physical forms. For a document, you might choose 8 1/2 x 11 and Microfiche.
# of Pages	The number of pages in the document, if applicable.

Field	Comments
In Stock	Select the check box to specify whether the item is in stock, if applicable.
Part #	The item's part number, if applicable.

- 5** In the Component Items list, add a new record.
- 6** Select the record to be added, and then click Add.
- 7** In the Component Items list, add any other new records that are needed to create the kit.

About Making Literature Visible to Users

You can make literature visible to users in the following ways:

- **The Products Screen.** You can associate literature with a product, and the user can display it using the Products screen.
- **The Competitors Screen.** You can associate literature with a competitor, and the user can display it using the Competitors screen.
- **The Correspondence Screen.** You can deselect the Internal field of a literature record and the user can select it as an enclosure in correspondence.
- **The Literature Screen or Infocenter Explorer.** You can make literature visible to users, so it is included in the list of literature that they display in the Literature or Infocenter Explorer.

Sharing Literature Through the Products Screen

End users who are salespeople find it useful to view literature about your products when they are viewing other information about the products. If you associate literature with a product, end users can view this literature when they view the product record in the Products screen.

To share literature through the Products screen

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** In the Literature list, select a literature record or add a new literature record.
- 3** In the More Info form, click the select button in the Products field.
- 4** In the dialog box, select a Product and Part # to be associated with the literature record, and then click OK.

If no Products were previously associated with the literature record, you can use the Associated Products dialog to set up a new association.

Sharing Literature Through the Competitors Screen

Salespeople find it useful to view their competitors' literature or to view literature that your company has prepared that compares your products with your competitors. If you associate literature with a competitor, end users can view this literature when they view the competitor record in the Competitors screen.

To share literature through the Competitors screen, you must associate it with a competitor. You must also decide whether to select the Internal flag, which determines whether it is displayed in the Comparative Literature List or the Competitive Literature list of the Competitors screen:

- If you select the Internal flag, the literature will appear in the Comparative Literature list, and it will not be available as an enclosure in the Correspondence screen.
- If you do not select the Internal flag, the literature will appear in the Competitive Literature list, and it will be available as an enclosure in the Correspondence screen.

Whether you select Internal depends on what type of literature it is:

- **Competitors' literature.** Your salespeople may want to use literature produced by competitors, such as sales brochures, to help them compare your products with what the competition is offering. However, you would not want to distribute this literature outside your company. You should select Internal, so the literature will not be available in the Enclosures list of the Correspondence screen, but it will appear in the Comparative Literature in the Competitors screen.
- **Comparative literature for internal use.** You may develop comparative literature internally, such as competitive intelligence, that is meant for use by your sales people and that you do not want to distribute outside your company. You should select Internal, so the literature will not be available in the Enclosures list of the Correspondence screen, but it will appear in Comparative Literature in the Competitors screen.

- **Comparative literature for external use.** You may develop comparative literature internally that is aimed at your customers, or you may have third party comparative reports that you want to distribute to your customers. You should not select Internal, so the literature will be available in the Enclosures list of the Correspondence screen, and it will also appear in Competitive Literature in the Competitors screen.

To share literature through the Competitors screen

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** In the Literature list, select a literature record or add a new literature record.
- 3** In the More Info form, click the select button in the Competitors field.
- 4** If the competitors that you want to list appear in the dialog box, select the competitors, and then click Close.
- 5** If the specific competitors are not listed in the dialog box, click New.

The Competitors dialog box changes, now listing all possible competitors. You can use the Find button to locate a specific company.

- 6** In the Competitors dialog box, select the competitors and click OK.

When users display this competitor record in the Competitors screen, they will be able to display the literature in Comparative Literature list if you selected Internal or in the Competitive Literature list if you did not select Internal.

Sharing Literature Through the Correspondence Screen

End users may want to use literature as enclosures in correspondence. They may also use literature records that represent literature item kits as enclosures in correspondence.

Literature is available to users in the correspondence screen if the Internal field of the Literature record is not selected.

To share literature through the Correspondence screen

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** In the Literature list, select a literature record or add a new literature record.

Make sure the Internal field of this record is not selected.

When users create correspondence, they will be able to add this literature as an enclosure.

Sharing Literature Through Literature or Infocenter

Your end users may work with literature by displaying the Literature screen or Infocenter Explorer and searching the Literature list in that screen for the piece of literature they need.

You generally share literature with users by associating the user with access groups and associating literature with categories. Before you can do this, you must create categories that include literature, create access groups that include end users, and associate the categories with the access groups. For more information, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.

After you have completed this preliminary work, you can assign literature to end users as follows:

- When you produce new literature, associate it with the appropriate category and it will be visible to all end users in access groups associated with that category.
- When you hire new employees, associate them to with the appropriate access group and they will have visibility to all the literature in categories associated with that category.

A business manager who administers literature makes it visible to users by associating it with the appropriate category in either the Literature Administration screen or the Catalog Administration screen. After it is assigned in either of these ways, users in access groups associated with this category will be able to display it in the Literature screen.

To associate literature with a category using the Literature Administration screen

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** In the Literature list, select the record for the literature you want to associate with a category.
- 3** In the Category form, add a new record.
- 4** In the dialog box, select the item to be associated with the category, and then click OK.

The literature is associated with the category.

To associate literature with a category using the Catalog Administration screen

- 1** From the application-level menu, choose View > Site Map > Catalog Administration > Catalog Administration.
- 2** In the Catalogs list, drill down on the Name of the catalog to be associated with the literature.

A Categories list appears.
- 3** Click the Literature view tab.
- 4** In the Literature list, add a new record.
- 5** In the dialog box, enter identifying information about the literature (for example, the document Name), and then click Go.
- 6** When the dialog box reappears listing the needed literature, select the literature item and click OK.

The literature is associated with the category.

D&B Integration **15**

This chapter describes the integration of D&B data with your Siebel application. Some topics included in this chapter are:

- Business scenarios for using D&B data within your Siebel application.
- Overview information about loading D&B data into the Siebel database.
- Procedures for setting up the symbolic URL to allow real-time searches and on-line report access.
- Maps of D&B data to Siebel data fields.

About D&B Data

D&B is a leading provider of business information. D&B's information and technology solutions help businesses find profitable customers, reduce credit risk, manage receivables, and manage vendors. D&B's database of commercial information consists of over 75 million records world wide.

For connected users, you can use your Siebel application to integrate with D&B data and reports. As a mobile client, you can access D&B data for accounts and contacts that have been promoted from D&B marketing data.

This allows you to:

- Use D&B marketing data within your Siebel application.
- Access D&B business and credit reports from within your Siebel application.

You can use this D&B data to support the following:

- **New Business or Customer Acquisition.** By querying on company size, line of business, and other criteria provided by D&B, you can generate lists of prospects to add to the sales pipeline or to support outbound marketing programs. By using the D&B corporate family linkage information, you can identify new prospects and opportunities within a company's extended family.
- **Customer Segmentation and Penetration.** You can profile specific market segments such as geography, industry, size, and other criteria to identify untapped opportunities or better align sales territories.
- **Customer Qualification.** Use your access to D&B business and credit reports to obtain detailed background and risk information on a company in order to focus sales efforts on higher-probability accounts and shorten the sales cycle.

NOTE: This chapter describes how the administrator loads and updates D&B data. For information about viewing and using D&B data within the Siebel application, see *Siebel Sales User Guide, MidMarket Edition*.

Business Scenarios

The following scenarios describe how you can use D&B data in your company.

Build and Grow Current Customer Relationships

D&B data can help you find out how many relationships you already have within the complete corporate family structure. Use the D&B D-U-N-S number to view the organizational hierarchy of your clients and also to aggregate account attributes at all levels within your clients.

For example, you are selling to 20 IBM locations and you find out that there are locations that you have never contacted.

Following the completion of a successful sales engagement, use D&B demographic data to query your existing customer base for other customers in the same industry who are approximately the same size. This gives you a targeted population for replicating the success and driving revenue.

New Business or Customer Acquisition

Despite best efforts by an organization's marketing department, the sales organization is constantly asking for more leads. To partially address the issue, the company provides all salespeople access to the companies in the D&B database so they can generate prospects in their territory.

Individual salespeople can query the D&B database using criteria matching their ideal target to find new leads. After generating a list of leads, salespeople can automatically add the companies and contacts to their accounts.

Additionally, D&B demographic data can be used to analyze customer buying habits and then applied to the business universe to provide targeted marketing lists for specific campaigns or for distribution to the sales force.

Customer Satisfaction and Account Planning

Standardizing customer information on the D&B D-U-N-S number gives you a means for house-holding your customer data and eliminating duplicate customer records. This increases your ability to manage existing customer relationships because all opportunities for a customer are linked to the same customer record.

Add D&B's corporate family linkage, and you have the ability to manage and plan for customers at a local and global level. For example, you may want to see a roll up of all opportunities and potential revenue for all companies and locations related to Coca-Cola worldwide.

Understanding the D&B D-U-N-S Number

The D-U-N-S (Data Universal Numbering System) number is a crucial component of D&B data. A D&B D-U-N-S number is a nonindicative, nine-digit number assigned to each business location in the D&B database. Each D-U-N-S number has a unique, separate, and distinct operation, and is maintained solely by D&B. Industries and organizations around the world use the D&B D-U-N-S number as a global standard for business identification and tracking.

Each company has a unique D&B D-U-N-S number associated with it. It acts as a unique identifier for a company in the D&B database.

To uniquely identify the association between different companies in the D&B database, each company also has associated D&B D-U-N-S numbers.

Several categories of D&B D-U-N-S numbers exist:

- **D&B D-U-N-S Number**—each unique business location listed in the D&B database is assigned a D&B D-U-N-S number. This column is called simply DUNS Number in your Siebel application.
- **Global Ultimate D-U-N-S**—the D&B D-U-N-S number belonging to a business's worldwide ultimate parent company.
- **Domestic Ultimate D-U-N-S**—the D&B D-U-N-S number belonging to the highest-level family member within a specific country.
- **Parent/HQ D-U-N-S**—the D&B D-U-N-S number belonging to a business's immediate headquarters or parent.

These numbers allow D&B to establish the relationships between different companies.

Process for Integrating D&B Data

The process of integrating D&B data into the D&B Account tables and the Siebel Account tables in the Siebel database involves the following steps:

- [Obtaining D&B Data](#)
- [Loading D&B Data](#) into staging tables in the Siebel database
- [Running the Siebel Update Server Components](#)

Obtaining D&B Data

You must obtain three data files from D&B:

- The Marketing Data file
- The MRC file
- The SIC file

Request these files in *Siebel format*, also referred to as 2202 or GDMDI data file format. D&B should be able to provide files in this format without difficulty.

To obtain MRC and SIC files, send email to:

`dnb4siebel@dnb.com`

In addition to these files, you can request D&B data layout documentation from D&B.

The Marketing Data File. This file contains detailed company information, such as the company's legal name, address, contact information, and so forth.

The MRC and SIC Files. These are both reference files required by the Siebel D&B modules. Both files contain information referenced by the demographic company data provided by D&B.

MRC stands for Management Responsibility Code. The MRC file contains a list of lookup values for the contacts and their positions such as CEO, Vice President of Marketing, and so on. Each contact has an associated numerical code that is referenced by the D&B marketing data to determine the title or position of a company contact.

SIC stands for Standard Industrial Classification, and is a code developed by the Federal government to describe the type of activity performed by the business at this location. The SIC file contains a list of SIC codes assigned and maintained by D&B along with their definitions. D&B's Primary SIC code indicates the line of business that provides the largest revenue contribution to the business. D&B also maintains and assigns six levels of subsidiary SIC codes to describe in greater detail additional lines of business activity for a given company. By default, the SIC code provided in the SIC file and the Marketing Data file is the 4-digit SIC code.

Loading D&B Data

After you have obtained the three D&B data files, you can start to load the data into the Siebel database. You can load the files in any order, but you must load all three files before running the Siebel update server component.

When creating your data loading scripts, refer to the documentation provided by D&B and to *Siebel Data Model Reference*.

The scripts and processes differ according to your database platform.

NOTE: When you integrate D&B data for the first time, you may want to contact Siebel Professional Services to obtain sample loading scripts for use as templates. See [“Loading D&B Data Using Sample Scripts” on page 260](#).

The scripts load D&B data into staging tables in the Siebel database, as shown in [Table 18](#).

Table 18. Staging Tables for Uploading D&B Data

File	Upload Location
Marketing Data file	S_DNB_UPDATE table This table is used as a staging area for the un-normalized D&B Marketing data.
SIC file	S_DNB_SIC table
MRC file	S_DNB_MRC table

NOTE: Definitions of these tables can be found in *Siebel Data Model Reference*.

Because SIC and MRC files change only rarely, updating D&B data usually requires deleting and reloading the D&B marketing data in the S_DNB_UPDATE table alone.

If you need to load new versions of the SIC and MRC files, you must delete the previously used staging tables.

[Table 19](#) lists what D&B data to delete and what to load.

Table 19. Loading or Reloading D&B Data

If You Are...	Then...
Loading D&B data for the first time	<ul style="list-style-type: none">■ Load the three D&B data files: Marketing Data file, SIC file, and MRC file.
Updating D&B data with a new Marketing Data file, but the SIC and MRC files have not changed	<ul style="list-style-type: none">■ Delete data from the S_DNB_UPDATE table.■ Load the Marketing file.
Updating D&B data with new Marketing Data, SIC, and MRC files	<ul style="list-style-type: none">■ Delete data from the S_DNB_UPDATE, the S_DNB_SIC, and the S_DNB_MRC tables.■ Load the three D&B data files: Marketing Data file, SIC file, and MRC file.

After loading files, you must run the D&B Update Manager (D&B) and the D&B Update Manager (Siebel) as described in [“About Siebel Update Server Components” on page 264](#).

Loading D&B Data Using Sample Scripts

This section provides some guidance on how to load D&B data on Oracle, DB2, and Microsoft SQL Server platforms using sample scripts. These scripts are not provided as part of the Siebel product, but may be obtained from Siebel Professional Services.

CAUTION: Before running scripts, you should check them against the D&B data layout documentation and against the S_DNB_UPDATE table columns documented in *Siebel Data Model Reference*. Then, modify the scripts as required.

Loading D&B Data on Oracle

Oracle installations require you to run SQLLOADER control files. You need the following control files:

- s_dnb_update.ctl (for loading Marketing Data file into S_DNB_UPDATE table)
- s_dnb_sic.ctl (only required if loading the SIC file)
- s_dnb_mrc.ctl (only required if loading the MRC file)

NOTE: This procedure is based on the assumption that you understand how to run SQLLOADER. SQLLOADER is described in the Oracle documentation.

To load D&B data if you are using Oracle

- 1** Verify that the column order of your D&B file matches the column requirements in the .ctl file before running the loading script.
- 2** Truncate the appropriate staging tables (see [Table 19 on page 259](#)).

To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

- 3** Modify the .sql file as appropriate for:
 - The name of your database

- The D&B filename and directory location
- The database table owner
- The user ID and password (with loading privileges) that you are using to load the data

4 Run SQLLOADER.

Loading D&B Data on DB2

DB2 installations require you to run DB2 IMPORT. You need the following .sql files:

- `imp_update_new.sql` (for loading Marketing Data file into S_DNB_UPDATE table)
- `imp_sic_new.sql` (only required if loading the SIC file)
- `imp_mrc_new.sql` (only required if loading the MRC file)

NOTE: This procedure is based on the assumption that you understand how to run DB2 IMPORT. DB2 IMPORT is described in the DB2 documentation.

To load D&B data if you are using DB2

- 1** Verify that the column order of your D&B file matches the column requirements in the .sql file before running the loading script.
- 2** Truncate the appropriate staging tables (see [Table 19 on page 259](#)).

To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities `ddlexp` (to back up the indexes before dropping) and `ddlmp` (to re-create them).

- 3** Modify the .sql file as appropriate for:
 - The name of your database
 - The D&B filenames and directory location
 - The database table owner

- The user ID and password (with loading privileges) that you are using to load the data
- 4 Run DB2 IMPORT.
- 5 Optional: After running the import scripts, update the DB2 catalog statistics by executing RUNSTATS on the three tables that received the D&B data (S_DNB_MRC, S_DNB_SIC, S_DNB_UPDATE).

Loading D&B Data on Microsoft SQL Server

Microsoft SQL Server installations require you to run SQL scripts. You need the following format files and SQL scripts:

- For loading the Marketing Data file:
 - S_DNB_UPDATE.fmt—a format file to load the data into the tempS_DNB_UPDATE table
 - S_DNB_UPDATE.sql—an SQL script that loads the data into S_DNB_UPDATE table
- For loading the SIC file:
 - S_DNB_SIC.fmt—a format file to load the data into the tempS_DNB_SIC table
 - S_DNB_SIC.sql—an SQL script that loads the data into the S_DNB_SIC table
- For loading the MRC file:
 - S_DNB_MRC.fmt—a format file to load the data into the tempS_DNB_MRC table
 - S_DNB_MRC.sql—an SQL script that loads the data into the S_DNB_MRC table

NOTE: This procedure is based on the assumption that you understand how to run bcp (bulk copy process) or similar data-loading utility. The bcp utility is described in the Microsoft SQL Server documentation.

To load D&B data if you are using Microsoft SQL Server

- 1** Verify that the column order of your D&B file matches the column requirements in the .sql file before running the loading script.
- 2** Truncate the appropriate staging tables (see [Table 19 on page 259](#)).

To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

- 3** Modify the .sql file as appropriate for:
 - The name of your database
 - The D&B filename and directory location
 - The database table owner
 - The user ID and password (with loading privileges) that you are using to load the data
- 4** Run bcp or another data loading utility.

About Siebel Update Server Components

Whenever you load or reload D&B data, you must update the D&B Account tables and the Siebel Account tables in the Siebel database. This update is accomplished by running server components:

- D&B Update Manager (D&B): Moving D&B marketing data from the staging table (S_DNB_UPDATE) into the normalized D&B Account tables, which are the basis for the D&B All Accounts View ([Figure 9 on page 266](#)).
- D&B Update Manager (Siebel): Updating the records in the Siebel Account tables for accounts with matching D-U-N-S numbers ([Figure 10 on page 267](#)).
- A third component, D&B Update Manager MultiTask, is also provided. This component can be used in place of D&B Update Manager (D&B) or D&B Update Manager (Siebel) to run the update using multiple, parallel processes ([“About the Multiple Task Siebel Update Server Component” on page 267](#)).

Overview of the Update Process

This section outlines the process of loading D&B data from the staging tables to the D&B Account tables and through to updating the Siebel account tables.

This process recommends using the D&B Update Manager MultiTask server component to run server component tasks in parallel. However, use of the single task D&B Update Manager (D&B) and D&B Update Manager (Siebel) server components is also documented in this chapter.

- 1 Make sure you have loaded the D&B data into the staging tables as discussed in [“Loading D&B Data” on page 258](#) and [“Loading D&B Data Using Sample Scripts” on page 260](#).
- 2 Update the D&B Account tables with data from the staging tables:
 - To optimize performance, you may choose to do one of the following:
 - For first time data loading, that is, when there are no D&B records in the database, drop the indexes on these D&B Account tables: S_DNB_ORG, S_DNB_ORG_SIC, S_DNB_CON_MRC, and S_PRSP_CONTACT.

- For subsequent updates, drop the indexes on the S_DNB_ORG table only, all except for the indexes S_DNB_ORG_U1 (DUNS_NUM), S_DNB_ORG_P1 (ROW_ID), and S_DNB_ORG_M01 (the clustered index) on this table.
 - Create a search specification on the D-U-N-S number to set up your preferred batch sizes and determine the corresponding D-U-N-S number ranges per batch for loading the data from the staging tables to the D&B Account tables.
 - Execute concurrent D&B Update Manager (D&B) server tasks by running the D&B Update Manager MultiTask server component. See [“About the Multiple Task Siebel Update Server Component” on page 267](#) and [“Running the Siebel Update Server Components” on page 270](#).
 - Continue to execute the concurrent D&B Update Manager (D&B) server tasks until all data is loaded into the D&B Account tables.
 - If you dropped indexes on the D&B Account tables, re-create them. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).
- 3** Update the Siebel Account tables from the D&B Account tables for accounts with matching D-U-N-S numbers by executing concurrent D&B Update Manager (Siebel) server tasks using the D&B Update Manager MultiTask server component. See [“Multiple D&B Update Manager \(Siebel\) Processes” on page 269](#) and [“Running the Siebel Update Server Components” on page 270](#).

About the Single Task Siebel Update Server Components

The update server components are part of the Dun and Bradstreet Enterprise Component Group. This group and each of its D&B Batch Components must be enabled. Once enabled, each component can be run as a batch task. [Figure 9](#) shows how the staging tables are mapped to the D&B Account tables.

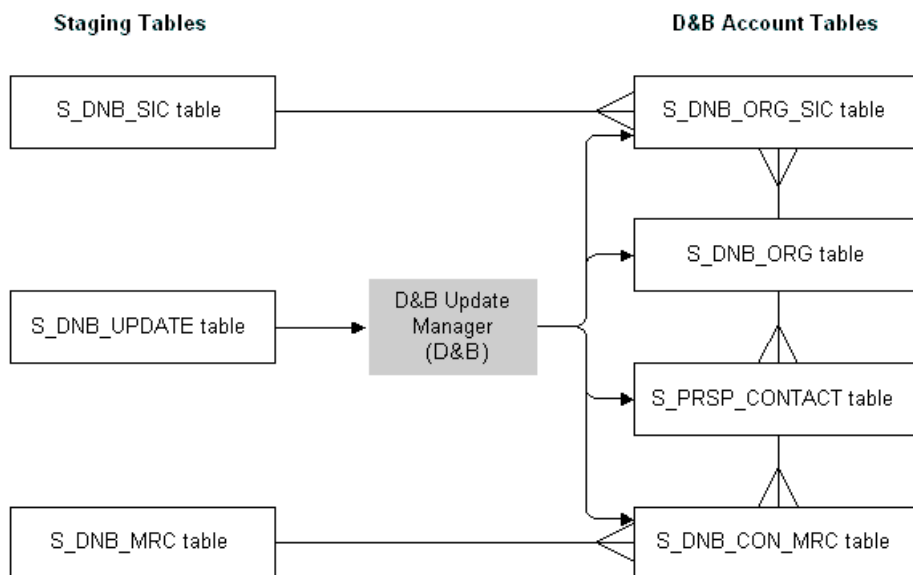


Figure 9. D&B Update Manager (D&B) Table Names

Figure 10 shows how the D&B Account tables are mapped to the Siebel Account tables.

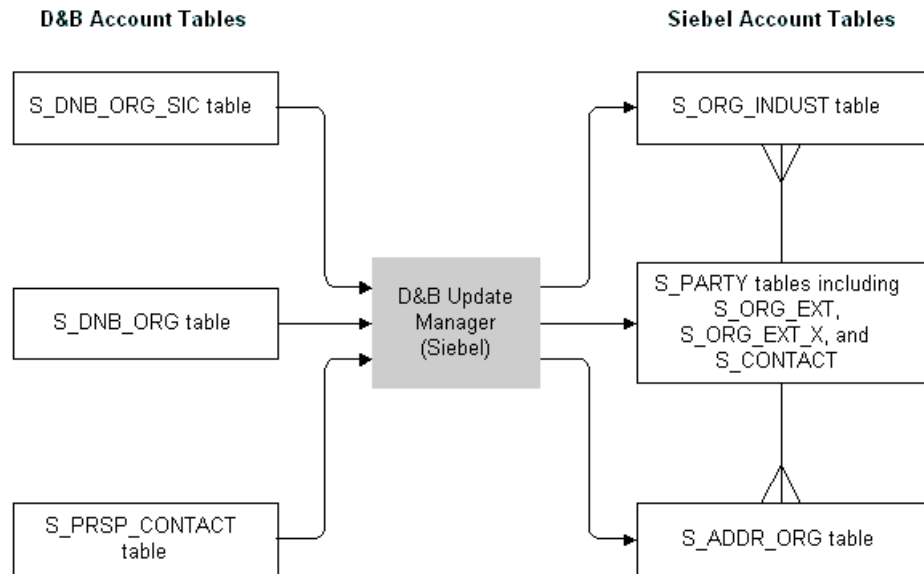


Figure 10. D&B Update Manager (Siebel) Table Names

“Field Mapping for the D&B Update Manager Process” on page 281 lists the default table mapping from the D&B Account tables to the Siebel Account tables that are used by the D&B Update Manager (Siebel) server component.

About the Multiple Task Siebel Update Server Component

You can use the server component DNBUpMgrMultiTask to spawn multiple Update Manager processes. Running several parallel processes helps you maximize your performance with large data loads and gives you greater scheduling flexibility. You can control the number of processes that are created by editing the dnbtask.cfg file. The dnbtask.cfg file contains two sections, one to set tasks for the D&B Update Manager (D&B) process and the second to set tasks for the D&B Update Manager (Siebel) process.

The dnbtask.cfg file is located in the sqltempl subdirectory, in the server installation directory.

Multiple D&B Update Manager (D&B) Processes

By default the dnbtask.cfg file sets up three simultaneous tasks, based on D-U-N-S number ranges. The DNBUpmgrDNB portion of the file looks like this:

```
[DNB]

Task1 = ,100000000
Task2 = 100000000,200000000
Task3 = 200000000,
```

These four ranges translate into four DNBUpmgrDNB tasks, each taking care of loading records within a particular D-U-N-S number range:

,100000000 means D-U-N-S numbers < 100000000

100000000,200000000 means D-U-N-S numbers > = 100000000 and < 200000000

200000000, means D-U-N-S numbers > = 200000000

Edit the file to change the number of parallel processes created or the range of D-U-N-S numbers updated.

CAUTION: If you use DNBUpmgrMultiTask to run multiple UpdateMgr processes, you must make sure that processes running at the same time have *mutually exclusive* ranges. Unpredictable results will occur if multiple processes collide.

Multiple D&B Update Manager (D&B) Processes with First Time Data Loading

The first time you load D&B data, that is, when there are no D&B records in the database, you may use a special .sql file (dnbinitial.sql) which is optimized to do only inserts. This results in faster loading of data than using the dnbmappings.tsq file.

To use the dnbinitial.sql file, set the server component parameter DNBBConfigFile to dnbinitial.sql. (For examples, see [Step 4 on page 272](#) and [Step 2 on page 273](#).) This can be done from Server Manager or from your Siebel application.

For subsequent updates, the DNBConfigFile should be set to dnbmaps.tsq.

NOTE: The dnbinitial.sql file assumes that you dropped the indexes on the D&B Account tables ([Step 2 on page 264](#)).

Multiple D&B Update Manager (Siebel) Processes

By default the dnbtask.cfg file sets up five simultaneous tasks, based on tables updated. The DNBUpMgrSieb portion of the file looks like this:

```
[Siebel]

Task1 = UPDATE_SIEBEL_ACCOUNT

Task2 = UPDATE_INDUST, COMMIT, UPDATE_SIEBEL_INDUST, COMMIT,
UPDATE_SIEBEL_SYNONYM

Task3 = UPDATE_SIEBEL_ADDR_PHY, COMMIT, UPDATE_SIEBEL_ADDR_MAIL

Task4 = UPDATE_SIEBEL_CONTACT

Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT,
UPDATE_SIEBEL_LOC3
```

You may edit the file to change the number of parallel processes created. However, note that the order of the updates within individual tasks is important; for example UPDATE_INDUST should be done before UPDATE_SIEBEL_INDUST. Use caution when updating the DNBUpMgrSieb portion of the dnbtask.cfg file.

CAUTION: If you have modified the RTI configuration file to insert new accounts into the Siebel Accounts table, do not run the multiple task process. Instead you must run the single task D&B Update Mgr (Siebel) server component. Make sure you have modified the dnbmaps.sql file used by the single task server component. The order of the updates is critical to data integrity if new accounts are being added.

Running the Siebel Update Server Components

There are two ways to run the Siebel update server components:

- From within the Siebel application
- From a command line interface, using Server Manager

Procedures for running the update processes from both within the Siebel application and from the command line. (Whatever procedures you choose to follow, make sure that the D&B Update Manager (D&B) process is complete before you start the D&B Update Manager (Siebel) process.)

- [“To run the D&B Update Manager \(D&B\) server component from within your Siebel application \(single task process\)” on page 271](#)
- [“To run the D&B Update Manager \(D&B\) server component from within your Siebel application \(multiple task process\)” on page 272](#)
- [“To run the D&B Update Manager \(Siebel\) server component from within your Siebel application \(single task process\)” on page 272](#)
- [“To run the D&B Update Manager \(Siebel\) server component from within your Siebel application \(multiple task process\)” on page 273](#)
- [“To run the D&B Update Manager \(D&B\) server component from a command line \(single or multiple task process\)” on page 273](#)

- “To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)” on page 274

NOTE: If you have just installed the Siebel Server or if you have made changes to the Siebel Name Server, you need to synchronize before running the Siebel update server component. For more information about synchronizing server components, see *Siebel Server Administration Guide, MidMarket Edition*.

TIP: If you are going to run the D&B Update Mgr (Multi-task) component, make sure that the maximum number of tasks (MaxTasks parameter) is set correctly to accommodate the number of tasks that you specified in the dnbtask.cfg file. For information about MaxTasks, see *Siebel Server Administration Guide, MidMarket Edition*.

To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)

- 1 Check the state and mode for the Update Mgr component:
 - a From the application-level menu, choose View > Site Map > Server Administration > Enterprise Configuration.
 - b Click the Enterprise Component Groups view tab.
 - c In the Enterprise Component Groups list, select the Dun and Bradstreet component group.
 - d For the Dun and Bradstreet record, make sure that the state is Enabled.

If it is not enabled, enable it by clicking the menu button in the Enterprise Component Groups list and clicking Enable Component Group. Then synchronize. For more information on enabling component groups and synchronizing server components, see *Siebel Server Administration Guide, MidMarket Edition*.

- 2 From the Show drop-down list, select Enterprise Operations.
- 3 Click the Component Requests view tab.
- 4 In the Component Requests list, click New.

- 5** In the Component Requests form, in the Component/ Job field, select D&B Update Mgr (D&B). Make sure the Mode is set to Asynchronous.
- 6** In the Component Requests form, click the menu button and click Submit Request.
- 7** When the D&B Update Mgr (D&B) is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log file is named DNBUpmgrDNB_TaskNumber.log.

To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)

- 1** Follow [Step 1](#) to [Step 4](#) of the procedure “[To run the D&B Update Manager \(Siebel\) server component from within your Siebel application \(single task process\)](#)” on page 272.
- 2** In the Component Requests form, in the Component/ Job field, select D&B Update Mgr (Multi-task). Make sure the Mode is set to Asynchronous.
- 3** In the Component Request Parameters list, add a new record, set the Name field to DNBTASKCODE, and in the Value field enter DNB.
- 4** If data is being loaded for the first time, add a second new request parameters record, set the Name field to DNBConfigFile and in the Value field enter dnbinital.sql
- 5** In the Component Requests form, click the menu button and click Submit Request.
- 6** When the process is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review.

To run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process)

- Follow the procedure “[To run the D&B Update Manager \(D&B\) server component from within your Siebel application \(single task process\)](#)” on page 271, except that at [Step 5](#), set the Component/ Job field to D&B Update Mgr (Siebel).

To run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process)

- 1 Follow [Step 1 to Step 4](#) of the procedure [“To run the D&B Update Manager \(Siebel\) server component from within your Siebel application \(single task process\)”](#) on page 272.
- 2 In the Component Requests form, in the Component/ Job field, select D&B Update Mgr (Multi-task). Make sure the Mode is set to Asynchronous.
- 3 In the Component Request Parameters list, add a new record, set the Name field to DNBTaskCode and in the Value field enter Siebel.
- 4 In the Component Requests form, click the menu button and click Submit Request.
- 5 When the process is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review.

To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)

- 1 Log in to the server using Server Manager. Use a command with this format:

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

Examples:

```
>srvrmgr /g evlab6 /e siebel /u sadmin /p sadmin /s evlab6
```

```
>srvrmgr /g smte420s053:2321 /e siebel /u sadmin /p sadmin /s
smte420s053
```

- 2 At the srvrmgr prompt, enter one of the following commands:
 - start task for comp DNBUpMgrDNB (for single task process)
 - start task for comp DNBUpMgrMultiTask with DNBTaskCode=DNB (for multitask process)
 - start task for comp DNBUpMgrMultiTask with DNBTaskCode=DNB DNBConfigFile=dnbinitial.sql (for initial data loading; see [“Multiple D&B Update Manager \(D&B\) Processes with First Time Data Loading”](#) on page 268)

- 3 During the DNBUpMgrDNB or DNBUpMgrMultiTask server process, monitor the status by entering the list task command:

```
list task for comp DNB%
```

- 4 When the D&B Update Mgr (D&B) or D&B Update Mgr (Multi-task) server process is finished, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log files are named DNBUpMgrDNB_TaskNumber.log or DNBUpMgrMultiTask_TaskNumber.log.

To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)

- Follow the procedure [“To run the D&B Update Manager \(D&B\) server component from a command line \(single or multiple task process\).”](#) At the srvmgr prompt (Step 2 on page 273), enter one of the following commands:
 - start task for comp DNBUpMgrSIEB (for single task process)
 - start task for comp DNBUpMgrMultiTask with DNBTaskCode=Siebel (for multitask process)

Setting Up the Symbolic URL for Access to the D&B Database

When you have a connection to the Internet and have a D&B account set up already (with a user ID and password), you can:

- Obtain the most current account information by invoking real-time searches of the D&B database and online purchase
- Access and order D&B business and credit reports

For more information about D&B reports and about searching D&B for new accounts, see *Siebel Call Center User Guide, MidMarket Edition*.

To access D&B data live from your Siebel application through the D&B Web site, you must first contact D&B for a user ID, password, and payment options. Then you can set up your Siebel application to access the D&B database.

To set up the symbolic URL for D&B real-time search and update

- 1** From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.
- 2** In the Symbolic URL list, select DNBGlobalAccess.
- 3** Make sure the URL is <https://globalaccess.dnb.com/access/scripts/broker.asp>
- 4** In the Symbolic URL Arguments list:
 - a** Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.

NOTE: This field is not case-sensitive.

- b** Select the USERPASS record, and enter the password provided by D&B in the Argument Value field.

To set up the symbolic URL for D&B report ordering

- 1** From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.

- 2** In the Symbolic URL list, select DNBReport.
 - 3** Make sure the URL is `https://reportserver/scripts/ProductRetriever` and that the Host Name is `www.dnb.com`.
 - 4** In the Symbolic URL Arguments list:
 - a** Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.
-
- NOTE:** This field is not case-sensitive.
-
- b** Select the USERPSWD record, and enter the password provided by D&B in the Argument Value field.
 - 5** From the Show drop-down list, select Host Administration.
 - 6** In the HTTP Host list, make sure that there is a record where Name is `www.dnb.com` and Virtual Name is *reportserver*.

Additional Information for Configurators of D&B Integration

For general guidance on configuration, refer to [Table 20](#).

Table 20. What to Configure?

If You Need to Customize the...	Then...
Single task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)	<ul style="list-style-type: none"> ■ Edit the dnbmaps.sql file in the ...\\siebelserver\\SQLTEMPL directory. ■ Determine and make, if necessary, corresponding changes for account promotion.
Multiple task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)	<ul style="list-style-type: none"> ■ Edit the dnbmaps.tsq file in the ...\\siebelserver\\SQLTEMPL directory. ■ Determine and make, if necessary, corresponding changes for account promotion.
Account promotion	<ul style="list-style-type: none"> ■ Configure the maps listed in Table 26. ■ Determine and make, if necessary, corresponding changes in the update server processes.

A number of specific configuration topics are discussed in this section:

- [Update Server Process Configuration](#)
- [Account Promotion and Prospect List Creation Configuration on page 278](#)
- [Running the D&B Update Manager \(Siebel\) Process Without Updating Account Name or Account Location on page 279](#)

Update Server Process Configuration

The D&B update server processes use the Batch Real-Time Integration (RTI) technology and the RTI configuration files (dnbmaps.sql for single task and dnbmaps.tsq for multiple tasks). You can edit the RTI configuration files to suit your business requirements.

The general syntax of the RTI maps specified in the configuration files is as follows:

```
UPDATE_SOME_TABLE.MOD1TABLE = [Target Table to update]
```

```
UPDATE_SOME_TABLE.MOD1WHERE = [A WHERE clause]
```

```
UPDATE_SOME_TABLE.MOD1INSERT = [TRUE/FALSE]
```

```
UPDATE_SOME_TABLE.MOD1UPDATE = [TRUE/FALSE]
```

```
UPDATE_SOME_TABLE.MOD1DELETE = [TRUE/FALSE]
```

```
UPDATE_SOME_TABLE.MOD1SQL = [A Valid SQL Query]
```

The RTI configuration files are located in the ...\\siebelserver\\SQLTEMPL directory.

[“Field Mapping for the D&B Update Manager Process” on page 281](#) lists the default mapping for the D&B Update Manager (Siebel) server component.

Use caution when making changes to these RTI configuration files. It is recommended that you engage a qualified professional for your customization process.

CAUTION: Do not change the default DELETE setting in the existing UPDATE* sections. Do not set DELETE to TRUE. If your business need necessitates deleting rows in the target table as part of the D&B Update Manager process, consult Siebel Professional Services for help with this customization process.

Account Promotion and Prospect List Creation Configuration

You can select specific fields that will be populated by the D&B promotion to a Siebel account or by the D&B list-creation process. These are controlled by maps in the business component user properties within the DNB Account and DNB Contact business components. These maps are listed in [Table 26 on page 287](#).

Using Siebel Tools, you can change, add, or delete source and destination field mapping. Reference the map descriptions given in [Table 26 on page 287](#) to determine which map to use for a given set of source and destination fields.

Use caution when making changes to these maps. It is recommended that you engage a qualified professional for your customization process.

CAUTION: Although the delete capability is available, it is recommended that you deactivate unwanted map entries instead of deleting them. This is safer and can be accomplished by checking or clicking the deactivate column for the undesired entry.

You can add an entry using the following syntax:

```
Name Column: [MAP NAME]: [DESTINATION FIELD]
```

```
Value Column: [D&B SOURCE FIELD]
```

NOTE: Each map works only with a specific Destination Business Component and a specific Source Business Component.

Running the D&B Update Manager (Siebel) Process Without Updating Account Name or Account Location

Depending on your business process, you may want to run the D&B Update Manager (Siebel) server component without updating the existing account names and account locations. This is done by editing the RTI configuration file.

TIP: When debugging in your test environment, increase the event log level to 4 to see more details in the log file. However, it is strongly recommended that you set the level to 1 (the default) when you run in a production environment in order to prevent the log file from overflowing. For information on event logging, see *Siebel Server Administration Guide, MidMarket Edition*.

To edit the RTI configuration file so that account names are not updated

- 1 Open the RTI configuration file (dnbmaps.sql for single task or dnbmaps.tsq for multiple task) in a text editor.
- 2 Search for `UPDATE_SIEBEL_ACCOUNT.MOD1SQL` under the Oracle, Microsoft SQL Server, or DB2 SQL statements.

- 3 Search for `dnb.BUSINESS_NAME` within the `UPDATE_SIEBEL_ACCOUNT.MOD1SQL` `SELECT` statement.

- 4 Comment out the line that begins `dnb.BUSINESS_NAME...` as shown.

```
UPDATE_SIEBEL_ACCOUNT.MOD1SQL =  
  
    SELECT acct.ROW_ID                ROW_ID,  
  
;dnb.BUSINESS_NAME                NAME,
```

- 5 Save and close the file.

To edit the RTI configuration file so that account locations are not updated (single task)

- 1 Open the `dnbmaps.sql` file in a text editor.
- 2 Search for the `UPDATE_SIEBEL = UPDATE_SIEBEL_ADDR_PHY...` statement. This statement specifies the Siebel Table Groups to be updated when D&B Update Manager (Siebel) server component is run.
- 3 Within this statement, remove `COMMIT, UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT, UPDATE_SIEBEL_LOC3`.
- 4 Save and close the file.

To edit the RTI configuration file so that account locations are not updated (multiple task)

- 1 Open the `dnbtask.cfg` file in a text editor.
- 2 Under the `[Siebel]` section, comment out the line that begins `Task5...` as shown.

```
;;Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT,  
UPDATE_SIEBEL_LOC3
```
- 3 Save and close the file.

Field Mappings for Configuration of D&B Integration

This section provides field mapping information for three types of D&B integration processes:

- [Field Mapping for the D&B Update Manager Process](#)
- [Field Mapping for D&B Real-Time Updates](#)
- [Field Mapping for Account Promotion and Prospect Lists](#)

Field Mapping for the D&B Update Manager Process

D&B Update Manager (D&B) server component. For the table mapping for the D&B Update Manager (D&B) component, examine the appropriate tables ([Figure 9 on page 266](#)) using Siebel Tools. The default field mappings can be determined by examining the UPDATE_DNB* sections of the RTI configuration file (dnbmaps.sql or dnbmaps.tsq).

D&B Update Manager (Siebel) server component. When the D&B Update Manager (Siebel) server component is run ([Figure 10 on page 267](#)), the fields listed in [Table 21](#), [Table 22 on page 283](#), and [Table 23 on page 283](#) are mapped. The field mappings can also be determined by examining the UPDATE_SIEBEL* sections of the RTI configuration file.

For information about changing these default mappings, see [“Update Server Process Configuration” on page 277](#).

Table 21. S_DNB_ORG Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
DUNS_NUM	S_ORG_EXT	DUNS_NUMBER
BUSINESS_NAME	S_ORG_EXT	NAME
TRADESTYLE	S_ORG_SYN	NAME
SCND_TRADESTYLE	S_ORG_SYN	NAME
PHYS_STREET_ADDR	S_ADDR_ORG	ADDR
SECOND_STREET_ADDR	S_ADDR_ORG	ADDR

Table 21. S_DNB_ORG Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
PHYSICAL_CITY	S_ADDR_ORG	CITY
PHYSICAL_STATE	S_ADDR_ORG	PROVINCE or STATE
PHYSICAL_ZIP	S_ADDR_ORG	ZIPCODE
COUNTRY_NAME	S_ADDR_ORG	COUNTRY
COUNTY_NAME	S_ADDR_ORG	COUNTY
MAIL_ADDRESS	S_ADDR_ORG	ADDR
MAIL_ADDRESS_2	S_ADDR_ORG	ADDR
MAIL_CITY	S_ADDR_ORG	CITY
MAIL_STATE	S_ADDR_ORG	STATE
MAIL_ZIP	S_ADDR_ORG	ZIPCODE
TELEPHONE	S_ORG_EXT	PH_NUM
FAX_NUMBER	S_ORG_EXT	FAX_PH_NUM
ANNL_SLS_AMT	S_ORG_EXT_X	ATTRIB_14
CURRENCY_CODE	S_ORG_EXT	BASE_CURCY_CD
EMPLOYEES_TOTAL	S_ORG_EXT_X	ATTRIB_26
EMPLOYEES_HERE	S_ORG_EXT	EMP_COUNT
YEAR_STARTED	S_ORG_EXT_X	ATTRIB_27
LOC_TYPE_STAT_IND	S_ORG_EXT	included in LOC
PUBLIC_PRIVATE_IND	S_ORG_EXT_X	ATTRIB_08
GLBLULT_DUNS_NUM	S_ORG_EXT	GLBLULT_DUNS_NUM
DOM_ULT_DUNS_NUM	S_ORG_EXT	DOM_ULT_DUNS_NUM
PAR_DUNS_NUM	S_ORG_EXT	PAR_DUNS_NUM
LINE_OF_BUSINESS	S_ORG_EXT_X	ATTRIB_03
PCT_GROWTH_SLS_3YR	S_ORG_EXT_X	ATTRIB_15

The S_PRSP_CONTACT table contains information about the D&B contacts such as the name of the CEO and various company executives. D&B provides up to four contacts per D&B account.

Table 22. S_PRSP_CONTACT Table Mapping for D&B Update Manager

From Column	To Table	To Column
LAST_NAME	S_CONTACT	LAST_NAME
FST_NAME	S_CONTACT	FST_NAME
MID_NAME	S_CONTACT	MID_NAME
PER_TITLE	S_CONTACT	PER_TITLE
PER_TITLE_SUFFIX	S_CONTACT	PER_TITLE_SUFFIX
JOB_TITLE	S_CONTACT	JOB_TITLE
SEX_MF	S_CONTACT	SEX_MF

The S_DNB_ORG_SIC table contains the Standard Industrial Classification (SIC) code developed by the US Government. The code is assigned to businesses and other organizations by classifying and subdividing the activity performed by that establishment at that location. D&B provides up to six SICs per D&B account. In the D&B Update Manager process, the primary SIC code is mapped to the S_INDUST table and all SIC codes are mapped to the S_ORG_INDUST table.

Table 23. S_DNB_ORG_SIC Table Mapping for D&B Update Manager

From Column	To Table	To Column
ROW_ID	S_INDUST	PR_INDUST_ID
	S_ORG_INDUST	INDUST_ID

Table 24 describes how address and contact information is updated by the D&B Update Manager (Siebel) process.

Table 24. Update Rules for Addresses and Contacts

If This D&B Information Changes...	Then...
Street address City (Abbreviated) state	A new address record is added to the Address table.
Address information other than street address, city, or state	The address record is updated in the Address table.
Phone number Fax number	The address record is updated in the Address table.
Contact first name or Contact last name	A new contact record is added to the Contact table.
Contact information other than first or last name	The contact record is updated in the Contact table.

Field Mapping for D&B Real-Time Updates

When you purchase account information through the D&B Web site using the D&B real-time search and update feature in the Siebel application, certain fields in the Siebel business components are populated. These fields are a subset of the fields that are populated by the D&B Update Manager (D&B) server component. For example, D&B does not provide the contact first, last, and middle names fields in the real-time update.

Table 25 lists the fields that may be populated or updated when you purchase account information using the D&B real-time search and update feature.

Table 25. Fields Populated by D&B Real-Time Search and Update

D&B WorldBase Marketing Plus with Linkage	Siebel <i>Business Component Name.Field Name</i>
Business Structure Code (Location Type)	DNB Account.Location Type
Domestic Ultimate Name	DNB Account.Domestic Ultimate Business Name
Global Ultimate Name	DNB Account.Global Ultimate Business Name
Parent/HQ Business Name	DNB Account.Parent HQ Name
Physical State	DNB Account.State Name
Business Name	DNB Account.Business Name
Trade Style	DNB Account.Trade Style
Street Address	DNB Account.Physical Address
Mail Address	DNB Account.Mail Address
City Name	DNB Account.Physical City
Mail City Name	DNB Account.Mail City
Physical State/Province Abbreviation	DNB Account.Physical State
Mailing State/Province Abbreviation	DNB Account.Mail State
ZIP/Postal Code	DNB Account.Physical Zip
Mail Postal/ZIP Code	DNB Account.Mail Zip
Country Name	DNB Account.Country Name
D&B D-U-N-S Number	DNB Account.DUNS Number
Telephone Number	DNB Account.Main Phone 2
Cable/Telex Code	DNB Account.Cable Telex Number
Facsimile Number	DNB Account.Main Fax 2

Table 25. Fields Populated by D&B Real-Time Search and Update

D&B WorldBase Marketing Plus with Linkage	Siebel <i>Business Component Name.Field Name</i>
National ID	DNB Account.National Identification Number 2
SIC Code	DNB Account.SIC Code
Primary Local Activity Code	DNB Account.Primary Local Activity Code
Year Started	DNB Account.Year Started 1
Employees Here	DNB Account.Employee Here
Employees Total	DNB Account.Employee Total
Annual Sales US Dollars	DNB Account.Sales Volume
Annual Sales Local	DNB Account.Annual Sales Local Currency
Legal Status	DNB Account.Legal Status
Subsidiary Code	DNB Account.Subsidiary Indicator
Import / Export / Agent Ind.	DNB Account.Import Export Code
Global Ultimate D&B D-U-N-S Number	DNB Account.Global Ultimate DUNS
Global Ultimate Indicator	DNB Account.Global Ultimate Indicator
Global Ultimate WorldBase Country Code	DNB Account.Global Ultimate Country Code
Domestic Ultimate D&B D-U-N-S Number	DNB Account.Domestic Ultimate DUNS
Headquarter/Parent D&B D-U-N-S Number	DNB Account.Parent HQ DUNS
HQ/Parent WorldBase Country Code	DNB Account.Parent/HQ Country Code

Field Mapping for Account Promotion and Prospect Lists

When end users promote D&B accounts or create prospect lists from the D&B screen, fields in the DNB Account and DNB Contact business components are mapped to fields in other business components. These maps are listed in [Table 26](#) and can be viewed in detail in the Business Component User Properties window of Siebel Tools.

For information about promoting accounts and creating prospect lists, see *Siebel Sales User Guide, MidMarket Edition*.

Table 26. Maps of D&B to Siebel Fields for Promotion and List Creation

User Property Prefix and Map Name	D&B Source Business Component	Siebel Destination Business Component	Process and Description
Account Map	DNB Account	Account	Promotion Specifies the fields in DNB Account that will be copied to Account business component
Contact Map	DNB Contact	Contact	Promotion Specifies the fields in DNB Contact that will be copied to Contact business component
Mailing Address Map	DNB Account	Business Address	Promotion Specifies the mailing address fields in DNB Account that will be copied to Business Address
Physical Address Map	DNB Account	Business Address	Promotion Specifies the physical address fields in DNB Account that will be copied to Business Address
Prospect Info Map	DNB Contact	List Mgmt Prospective Contact	Create Prospect List Specifies the biological information (such as last name, first name, and so forth)
Prospect Contact Info Map	DNB Account	List Mgmt Prospective Contact	Create Prospect List Specifies the contact information (such as company, address, phone number, and so forth) fields in the DNB Account that will be copied into the List Mgmt Prospective Contact

D&B Integration

Field Mappings for Configuration of D&B Integration

Integration Using ASIs 16

ASIs allow you to integrate Siebel applications with other applications in real time.

The Accounts or Contacts screens use ASIs to exchange data with any external system such as a back-office application. These are listed in [Table 27](#).

You must set up these ASIs shipped with your Siebel application before they can be used. This chapter provides the procedures that you must perform to set up these ASIs. Depending on your business needs, you may choose to set up ASIs and activate workflows for some or all of the GUI commands listed in [Table 27](#).

For general information about ASIs, see *Application Services Interface Reference**Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition*.

Table 27. ASIs for Accounts and Contacts

Screen	GUI Command	Workflow	Outbound and Inbound ASI Pairs	End-User Information
Accounts	Update External System	Synchronize Account ASI	External Account Siebel Account	<i>Siebel Call Center User Guide, MidMarket Edition</i>
Accounts (Credit Profile view)	Refresh	Get Account ASI		<i>Siebel Sales User Guide, MidMarket Edition</i>
Contacts	Update External System	Synchronize Contact ASI	External Contact Siebel Contact	<i>Siebel Call Center User Guide, MidMarket Edition</i> <i>Siebel Sales User Guide, MidMarket Edition</i>

Setting Up Account and Contact ASIs

This section describes how to set up the prebuilt ASIs for Accounts and Contacts:

- 1 Set up outbound and inbound Web services.** See [Setting Up Web Services for Account and Contact ASIs](#).
- 2 Activate workflows.** See [Activate Workflows for Account and Contact ASIs on page 292](#).

Other tasks you may want to perform are:

- **Extending ASIs.** See *Application Services Interface ReferenceApplication Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition*.
- **Deactivating fields in the ASIs.** See *Application Services Interface ReferenceApplication Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition*.
- **Customizing ASI workflows.** See *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Setting Up Web Services for Account and Contact ASIs

To set up the Web services, you must set up both outbound and inbound Web services for the ASIs. The procedures below show you the steps required for each ASI.

To set up an outbound Web service

- 1** From the application level menu, choose View > Site Map > Web Services Administration > Outbound Web Services.
- 2** In the Outbound Web Services list, create a query to display the record with External Account or External Contact in the Name field.

- 3 Verify that the fields in the Outbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	One of the following: External Account External Contact	Active

- 4 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Comments
Name	Enter a name for the port.
Port Type	Enter External Account or External Contact.
Transport	Select from the drop-down list.
Address	When you select a transport, the field will be populated with a template address. Edit the address based on where you are sending the data.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC.

To set up an inbound Web service

- 1 From Show drop-down list, select Inbound Web Service.
- 2 In the Inbound Web Service list, create a query to display the record with Siebel Account or Siebel Contact in the Name field.

- 3 Verify that the fields in the Inbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	One of the following: Siebel Account Siebel Contact	Active

- 4 In the Service Ports list, review the information in the fields for the service port and make any changes required for your system.
- 5 In the Operations list, review the information shown and make any changes required for your system.

Activate Workflows for Account and Contact ASIs

You must activate the following workflow processes used for real-time integration of account and contact data:

- Synchronize Account ASI
- Get Account ASI
- Synchronize Contact ASI

For a description of these workflows, see [“ASI Workflow Descriptions” on page 294](#).

To activate workflows used by Account and Contact ASIs

- 1 From the application level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
- 2 In the Workflow Processes list, use a query to find all processes where the Name field contains the word ASI. You can query on *ASI*.
- 3 For the workflows listed above, activate each workflow process that has the status Inactive.
 - a Select the workflow process record.

- b** Click Revise.

A copy of the workflow process record is created with a status of In Progress. The copy is automatically selected.

- c** Click Activate.

- d** Verify that the Status is Active.

- 4** When you are finished activating the workflow processes, restart the server.

For more information about workflow processes, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

ASI Workflow Descriptions

This section describes the workflow processes that are used to invoke the ASIs for account processes. The Synchronize Contact ASI process is essentially the same as the Synchronize Account ASI process, except that contact replaces account.

It is not necessary to modify these workflows, but you can modify them to suit your business model.

Synchronize Account ASI

This workflow submits the account information to the outside system to synchronize the information between the two systems.

- **Query For Account By Id:** Queries for the account on the current system using the object ID. Returns an account property set containing the account information.
- **External Account Proxy:** Calls the Synchronize method on the outside system, passing in the account property set. This step returns an account property set, which will contain any changes the outside system made to the account.
- **Synchronize Account:** Takes the account property set returned by the previous step and synchronizes it with the account in the current system.

Get Account ASI

This workflow queries the outside system to retrieve the latest information on the account. It returns the new information and synchronizes the account on the current system.

- **Query Account By Id:** Queries for the account on the current system using the object ID. Returns an account property set containing the account information.
- **Isolate Integration Id:** In the next step, the workflow uses a query by example. Query by example takes the property set and looks for an account with exactly the same values for the fields in the property set. If the account has changed on the outside system, those values will no longer match. The workflow needs to query by a value that does not change, that is, the integration ID. Isolate Integration Id takes in a property set and removes all the fields, except the integration ID.

- **External Account Proxy:** Using the property set, which only has an integration ID now, this step queries by example on the outside systems. Once it finds the account with that integration ID, it returns an account property set containing the account information.
- **Synchronize Account:** Takes the account property set returned by the previous step and synchronizes it with the account in the current system.

System Preferences

A

Table 28 lists the system preferences provided throughout your Siebel applications. For information about how to change system preferences, see [Chapter 3, “Ongoing Application Administration Tasks.”](#)

Table 28. System Preferences

Preference	Description
Alarm Manager Load Frequency	Number of minutes the system waits before rechecking for alarms. Default: 60
AllocationRule	Not applicable.
Always Show Message Bar Alerts	Display message even if the message bar is turned off. Default: False
Auto Mgr Calendar Access	Allow employee’s manager access to the employee’s calendar, even if the employee does not explicitly give the manager access. Default: False
BucketAvailCDtobeCounted	Not applicable.
BucketStatusCDtobeCounted	Not applicable.
CSM Logging	Enables logging of merge transactions. Merge transactions are created when connected users combine or merge two or more business components such as accounts or opportunities into one. Information from this log can be used to relink orphaned records created when the merge process is crossed with an update process during a synchronization. This is only applicable if the installation uses Siebel Remote. Default: False
DB2: Default Opt Level	Default optimization level which defines the optimizing algorithm that DB2 will use to execute SQL statements.

Table 28. System Preferences

Preference	Description
DBX Vis Rules per Statement 1	Number of visibility or routing rules checked per SQL statement processed by the Database Extract component for the first SQL statement with header information.
DBX Vis Rules per Statement N	Number of visibility or routing rules checked per SQL statement processed by the Database Extract component for other SQL statements.
Default Campaign Source Code	Default campaign for Web offers used in Siebel eCampaigns. All offers that are a part of the default campaign will appear in the Featured Offers Applet in Siebel eCampaigns.
Default Offer Code	Code to track the click path of a customer on the eCampaigns Web site who does not select a specific offer.
Default Time Zone	<p>Default time zone for all users of that database.</p> <p>When a user logs in, the Time Zone field of the User business component is checked. If it is empty, the Default Time Zone system preference is checked.</p> <p>Default: UTC</p>
DefaultFulfillInvloc	<p>Value that represents the default inventory location to use as a source inventory location for the Fulfillment Engine and Part Locator. Used as the Source Inventory Location if the user does not specify a Source Inventory Location at run time.</p> <p>The value must be the Row ID of the service inventory location. To find this ID, use the following procedure:</p> <ol style="list-style-type: none"> 1. In any Service Inventory view, select an inventory location. 2. From the Help menu, select About Record. 3. In the dialog box, click Details. <p>The Row # field contains the Row ID.</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
Docking: Get All PostnCon rows	<p>Enables the Transaction Router and Database Extract component to get <i>all</i> records in S_POSTN_CON table for a contact. Use this parameter to improve Siebel Remote performance. For more information, see <i>Siebel Remote Administration Guide, MidMarket Edition</i>.</p> <p>Default: False</p>

Table 28. System Preferences

Preference	Description
Docking: Transaction Logging	Enables docking transaction logging. For more information, see <i>Siebel Remote Administration Guide, MidMarket Edition</i> . Default: False
eAuc:AllowTimeStampAdvantage	Not applicable.
eAuc:AsyncNoticeCalls	Not applicable.
eAuc:AuctionURLRoot	Not applicable.
eAuc:AutoApproveBidder	Not applicable.
eAuc:AutoApproveLister	Not applicable.
eAuc:AutobidToReservePrice	Not applicable.
eAuc:BidIncrementMultiple	Not applicable.
eAuc:BidIncrMultipleTolerance	Not applicable.
eAuc:BidTimeTieBreakOption	Not applicable.
eAuc:DynamicCloseEnabled	Not applicable.
eAuc:DynamicCloseMaxDelay	Not applicable.
eAuc:EnforceExactBidIncrement	Not applicable.
eAuc:MaxMoneyValueAccepted	Not applicable.
eAuc:MaxRatingsPerSale	Not applicable.
eAuc:MaxThirdPartyListingDays	Not applicable.
eAuc:Notice Wf-Auction Alert	Not applicable.
eAuc:Notice Wf-Autobid	Not applicable.
eAuc:Notice Wf-Bid	Not applicable.
eAuc:Notice Wf-ListerBidAccept	Not applicable.
eAuc:Notice Wf-ListerClose	Not applicable.
eAuc:Notice Wf-ListerInvoiced	Not applicable.

Table 28. System Preferences

Preference	Description
eAuc:Notice Wf-Outbid	Not applicable.
eAuc:Notice Wf-PartialOutbid	Not applicable.
eAuc:Notice Wf-UserStatus	Not applicable.
eAuc:Notice Wf-UserWelcome	Not applicable.
eAuc:Notice Wf-Winner	Not applicable.
Entitlement: Verify Consumer	<p>Check the authorization of the contact requesting service. If preference is set to <code>TRUE</code>, the entitlements displayed must meet <i>one</i> of these criteria:</p> <ul style="list-style-type: none"> ■ The contact for the entitlement matches the service request contact. ■ The entitlement account is set to All Contacts, and the entitlement account matches the service request account or the account for the contact for the service request. <p>If no contact is selected, Siebel Service tries to verify the entitlement using the other entitlement settings.</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
Entitlement: Verify Dates	<p>Check that the service request falls within the time span of the entitlement. If the preference is set to <code>TRUE</code>, then the entitlements displayed are only those that provide coverage on the date the service request was opened: a date between the start and end dates for the entitlement.</p> <p>If the entitlement has no start or end date, it is not displayed.</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>

Table 28. System Preferences

Preference	Description
Entitlement: Verify Product	<p>Check that the asset or product is entitled to service. If the preference is set to TRUE, the agreements displayed must meet <i>one</i> of these criteria:</p> <ul style="list-style-type: none"> ■ The entitlement asset matches an asset in the service request. ■ The entitlement product matches a product in the service request (no asset or serial number specified). ■ The entitlement is set to All Products and the product or asset for the entitlement matches the product or asset for the service request. <p>If no product is selected, Siebel Service tries to verify the entitlement using the other Entitlement settings.</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
ETL Analysis End ETL Analysis Start ETL Date Format	<p>ETL Date format indicates the way dates need to be interpreted. The other two parameters mention the date range for which the Exchange Rates will be adjusted. This does not indicate that only the data created within this range will be extracted. Select the earliest date for the Analysis Start Date—that is, when the transactions may have begun. In addition to considering the created and modified dates, consider other relevant dates such as order date. Setting this to an early value such as 19700101 (January 1, 1970) does not affect the processing time. A similar logic applies for choosing Analysis End Date. Note that the values need to be entered in the format defined by ETL Date Format.</p> <p>Default Analysis End: 20101231</p> <p>Default Analysis Start: 19940101</p> <p>Default Date Format: YYYYMMDD.</p>
ETL Base Exchange Currency	<p>Currency in which all the financial data will be converted. While the OLTP supports transactions in many different currencies, the data in the OLAP is converted to a single currency for analysis purposes. The Exchange rates are derived from the Exchange Rates table in the OLTP.</p> <p>Default: USD.</p>
ETL Default Continent	<p>Value for any address that does not have Continent defined. Set this to a value, which will be used if the value of Continent is not defined in the OLTP.</p> <p>Default: North America.</p>

Table 28. System Preferences

Preference	Description
ETL Default Country	Value for any address that does not have the Country defined. Set this to a value, which will be used if the value of Country is not defined in the OLTP. Default: USA.
ETL Default Currency	Value for currency code that will be used if the currency code for a specific financial transaction is not set. Default: USA.
ETL Default Language	Language code used when language translation occurs when looking up the List of Values table. Default: ENU.
ETL LOV Maximum Value ETL LOV Minimum Value	In some fields, bucketing of values happens. Instead of saying the number of employees at an account is 45, 96, the values can be bucketed to 0-50, 50-100 and so on. In the List of Values, if the minimum and maximum values are not specified, the values of these parameters will be used. Defaults: 9999999999 and 0.
ETL Unknown Exchange Rate	Value used when an exchange rate for a currency to the Datamart Default Currency is undefined in the OLTP. Default: 1.
Forecast: Auto-Forecast	Creates subordinates' forecasts to be used in a rollup forecast, if the subordinates have not created forecasts themselves.
Forecast: Use Server Task	Send forecast processing requests to the Siebel Server for batch processing. If the value is False, requests are processed locally.
FSDB:Override Service Region	Maximum monetary value accepted in Bid and Fee currency fields.
FSPrevMnt: Def Act Owner ID	Not applicable.
FSPrevMnt: Default Org ID	Not applicable.
LOGMGR:Vis Rules per Statement	Set to 50 by default. For implementations that use any database other than Oracle, you should change this value to 20.
MRG:Docking Timestamp Source	Specifies whether the timestamp is based on the time a change was made on the client or on the server. For more information, see <i>Siebel Remote Administration Guide, MidMarket Edition</i> .

Table 28. System Preferences

Preference	Description
MRG:System Conflict Resolution	Sets the rule to be used for resolving database update conflicts. The rule may be either Server Wins (the default) or Client Wins. For more information, see <i>Siebel Remote Administration Guide, MidMarket Edition</i> .
MRG:Txns per Commit	<p>Number of database transactions the Transaction Merger processes before it issues a database commit. Setting a low value (1) reduces the frequency with which users encounter a locked database row and reduces the risk of deadlock. Setting a high value (10) minimizes processing overhead.</p> <p>For more information, see <i>Siebel Remote Administration Guide, MidMarket Edition</i>.</p> <p>Default DB2: 10.</p> <p>Default Microsoft SQL Server: 1.</p> <p>Default Oracle: 1.</p>
MRG:User Friendly Notification	<p>Determines whether Siebel Remote writes information about database updates to the Siebel Remote Status view on the Mobile Web Client. If the value is TRUE, Siebel Remote writes information about database updates. If the value is CONFLICTS, Siebel Remote writes information about database updates that caused conflicts. If the value is FALSE, Siebel Remote does not write any information about database updates.</p> <p>For more information, see <i>Siebel Remote Administration Guide, MidMarket Edition</i>.</p>
OrderItemStatusForOnOrderQty	<p>Specifies the valid values for the existing order item status. The values should be from the Order Item Status LOV and individual values should be language independent values (LIVs).</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
OrderItemStatusToBeFulfilled	<p>Specifies the valid values for Order Item Status. The values are from the Order Item Status LOV and the individual values are language independent values (LIVs).</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
OrderStatusForOnOrderQty	<p>Specifies the valid values for the existing order status. The values should be from the Order Status LOV and individual values should be LIVs.</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>

Table 28. System Preferences

Preference	Description
OrderStatusToBeFulfilled	<p>Specifies the valid values for Order Status. The values should be from the Order Status LOV and individual values can be any of the language independent values (LIVs).</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
OrderTypeForOnOrderQty	<p>Specifies the valid values for the existing order type. The values should be from the Order Type LOV and individual values should be language independent values (LIVs).</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
OrderTypeToBeFulfilled	<p>Specifies the valid values for Order Type. The values should be from the Order Type LOV and individual values can be any of the language independent values (LIVs).</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
ReplenishOrderPriority	<p>Specifies the default order priority. The values should be from the Order Priority LOV and individual values should be language independent values (LIVs).</p> <p>For more information, see <i>Siebel Service Guide, MidMarket Edition</i>.</p>
Satmetrix Key Value	<p>A string provided by Satmetrix to customers of Siebel Satmetrix eSurveys. Required for generating encrypted tokens that are part of URLs for displaying survey reports.</p>
Sch:Break Time Id	<p>Specifies the Row ID of the work type to be used when calculating the schedule cost where activities contain breaks. The default value is -1.</p> <p>To find the Row ID, navigate to the Application Administration screen > Work Type Administration view, select the record, choose About Record from the Help menu, and note the Row # value.</p>
Sch:Default Constraint Set	<p>Specifies the Row ID of the constraint set to be used where no constraint set is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Constraint Sets view, select the record, select About Record from the Help menu and note the Row # value.</p>

Table 28. System Preferences

Preference	Description
Sch:Default Cost Function	<p>Specifies the Row ID of the cost function to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Cost Functions view, select the record, select About Record from the Help menu and note the Row # value.</p>
Sch:Default Parameter Set	<p>Specifies the Row ID of the parameter set to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Parameter Sets view, select the record, select About Record from the Help menu and note the Row # value.</p>
Sch:Default Time Window	<p>Specifies the Row ID of the time window to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen > Time Window view, select the record, select About Record from the Help menu and note the Row # value.</p>
SecExternalUserAdministration	<p>An entry of FALSE allows administration of the directory through the Siebel application. For more information, see <i>Security Guide for Siebel eBusiness Applications, MidMarket Edition</i>.</p>
SecThickClientExtAuthent	<p>Allow changes to user data done on the dedicated client to propagate to the directory. Set this parameter to TRUE only on the dedicated Web client.</p> <p>For more information, see <i>Security Guide for Siebel eBusiness Applications, MidMarket Edition</i>.</p>
Security Adapter CRC	<p>Calculate the checksum value for your security adapter DLL, and enter the calculated value here.</p> <p>For more information, see <i>Security Guide for Siebel eBusiness Applications, MidMarket Edition</i>.</p>
SM WebIntelligence Server	<p>The URL that points to the Web Intelligence server that serves up reports for Siebel Analytics.</p>

Table 28. System Preferences

Preference	Description
SqlStyle	Indicate which SQL statements are to be used with this implementation—Oracle, Microsoft SQL Server, Informix, or Sybase. Case-sensitive.
SubSqlStyle	An SqlStyle that falls within a family of similar database products.
Technical Support (Alt. 1)	<p>Specifies the telephone numbers to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (Alt. 2)	<p>Specifies the telephone numbers to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (FAX)	<p>Specifies the fax number to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk fax number.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Technical Support (URL)	<p>Specifies the support URL to display in the Siebel Technical Support dialog box. Update this URL to match your internal help desk Web address.</p> <p>Set a value to None to leave it blank in the dialog box.</p>

Table 28. System Preferences

Preference	Description
Technical Support (Voice)	<p>Specifies the voice number to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number.</p> <p>Set a value to None to leave it blank in the dialog box.</p>
Universal Time Coordinated	<p>Turns on global time zone support for the entire system. Set this preference to TRUE to enable global time zone support. The default setting is TRUE.</p> <p>Note: This is a one-time setting. Once you have turned on global time zone support in a production environment, you should not turn it off.</p> <p>If you intend to operate your deployment with the Global Time Zone feature enabled, you must also set the operating system of your database servers to UTC time, or its equivalent. Failure to set the OS to UTC when the UTC parameter is set to TRUE will result in asynchronous server request errors.</p> <p>For more information on enabling Global Time Zone, see <i>Global Deployment Guide, MidMarket Edition</i>. Although enabling this feature is optional, it is strongly recommended that you operate your production environment with Global Time Zone enabled.</p>

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