



ONLINE HELP DEVELOPMENT GUIDE

MIDMARKET EDITION

VERSION 7.5

12-BUGMSK

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Introduction

This documentation provides information about the help implementation in Siebel eBusiness Applications, MidMarket Edition. It also contains information about customizing and migrating online help.

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.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

Help Developers	Persons responsible for planning, developing, and implementing online help systems.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.
Technical Writers	Persons responsible for the documentation of your Siebel applications.

The topics in this documentation assume that you are familiar with Siebel Tools, MidMarket Edition, help development, HTML authoring, the use of cascading style sheets, and JavaScript.

How This Guide Is Organized

[Chapter 1, “Help Implementation Overview”](#) contains an overview of the implementation of online help in Siebel eBusiness Applications to provide you with the information you need to customize Siebel online help.

If your Siebel eBusiness Application is an employee application, [Chapter 2, “Employee Applications”](#) provides all the information you need to implement customized help for your application.

If your Siebel eBusiness Application is a customer application, [Chapter 3, “Customer Applications”](#) provides all the information you need to implement customized help for your application.

If you need to deploy customized online help globally, see [Chapter 4, “Global Deployment.”](#)

[Chapter 5, “Help Source Files”](#) contains a detailed list of all the files used in the help systems a description of the cascading style sheet and JavaScript file used in the help systems.

Revision History

Online Help Development Guide, MidMarket Edition, Version 7.5

Help Implementation Overview

1

The topics in this section provide a high-level overview of the implementation of online help in Siebel 7 employee, partner, and customer applications. It also provides some tips about editing the HTML files that make up the help system.

The following topics are included:

- [“Employee Applications” on page 10](#)
- [“Customer Applications” on page 14](#)
- [“About Editing HTML Files” on page 16](#)

Employee Applications

Employee applications are generally used by internal employees of an enterprise. Siebel Call Center and Siebel Sales are examples of employee applications. In these applications, the help system is delivered in HTML format, and the help is context-sensitive at the screen level. When a user accesses help, the application calls the Siebel Web Engine (SWE) GotoPage method, which uses SWE code to display the correct help topic in a separate browser window.

The start page of the employee applications help system is siebstarthelp.htm, shown in [Figure 1](#). For information about using the help system, see [“Using the Employee Applications Online Help” on page 12](#).

Chapter 5, “Help Source Files” contains information about the files that make up the employee applications help system.

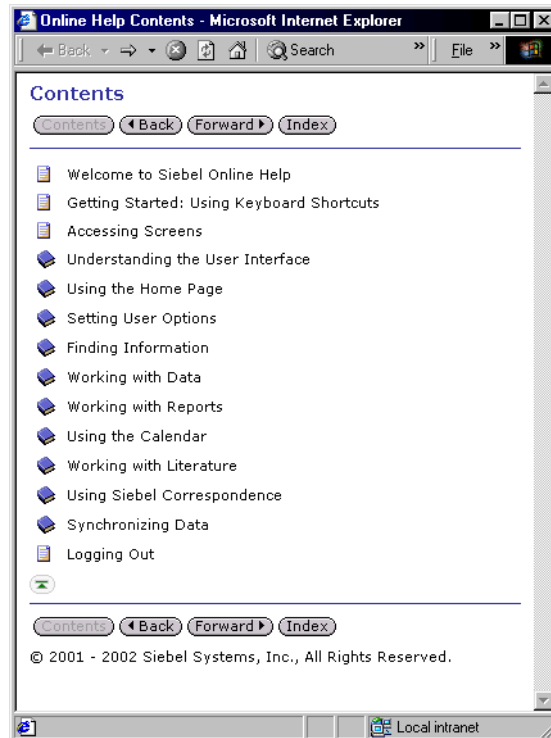


Figure 1. Start Page Employee Applications Help

Using the Employee Applications Online Help

After you have accessed the online help, you can use the Web browser's functionality to navigate in the help system and to print topics. In addition, the online help has an index that lets you find topic by keyword.

To link to help topics you recently visited

- To return to the last topic you viewed, click the Web browser's Back button.

-or-

Click the < Back button that appears at the start and end of each HTML page that makes up the help system.

- To view a topic you viewed before clicking the Web browser's Back button, click the Web browser's Forward button.

-or-

Click the Forward > button that appears at the start and end of each HTML page that makes up the help system.

To print a help topic

- Click the Web browser's Print button.

The current HTML page is printed to your default printer. The HTML page may consist of more than one topic.

To return to the main contents page

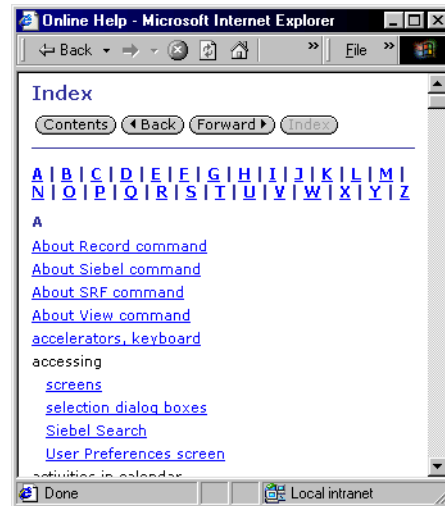
- In the help window, click the Contents button that appears at the start and end of each HTML page that makes up the help system.

The start page of the employee applications help system appears.

To search the help by keyword

- 1 In the help window, click the Index button.

The Index topic, shown below, appears.



- 2 Click a letter hyperlink at the start of the page to go to entries for that letter.
- 3 Click the hyperlink for the keyword.

The help topic appears.

Customer Applications

Customer applications are generally used by external partners, customers, and prospects of an enterprise. Siebel eSales and Siebel eService are examples of customer applications. In these applications, the help system is delivered in HTML format, and the applications are configured to show the start page of the help system in a separate browser window whenever a user accesses help. This is done by using the SWE GotoURL method.

The start page of the customer applications help system is siebcomgeneric.htm, shown in [Figure 2](#). For information about using the help system, see [“Using the Customer Applications Online Help” on page 15](#).

[Chapter 5, “Help Source Files”](#) contains information about the files that make up the customer applications help system.

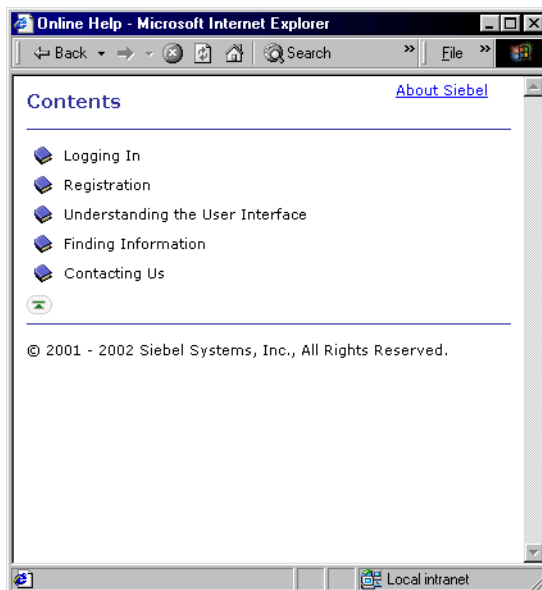


Figure 2. Start Page Customer Applications Help

Using the Customer Applications Online Help

Once you have accessed the online help, you can use the Web browser's functionality to navigate in the help system and to print topics.

To link to help topics you recently visited

- To return to the last topic you viewed, click the Web browser's Back button.
- To view a topic you viewed before clicking the Web browser's Back button, click the Web browser's Forward button.

To print a help topic

- Click the Web browser's Print button.

The current HTML page is printed to your default printer. The HTML page may consist of more than one topic.

To return to the main contents page

- In the help window, click the Contents hyperlink that appears at the start and end of each HTML page that makes up the help system.

The start page of the customer applications help system appears.

About Editing HTML Files

Siebel applications help files reside in a folder called “help.” When you have determined which HTML files you need to change, it is recommended that you copy those files to your local machine to make changes.

Testing and Distributing Changes

After you make your changes, you should verify your changes before distribution.

To test your changes

- 1 Use a standard HTML authoring tool to verify links.

NOTE: You should verify the links in the changed HTML file, and also make sure no links were broken in the existing HTML files.

- 2 In a Web browser, open the HTML file you changed and review the content.

When you have completed testing, you must distribute the updated files to the appropriate Siebel Servers, Siebel Mobile Web Clients, or Siebel Dedicated Web Clients.

The topics in this section describe the details of the help implementation in Siebel 7 employee applications. It explains the location of the help files and provides information about using Siebel Tools to change help calls. In addition, different options for customizing the online help to suit your requirements are discussed. If you customized the online help in earlier versions of your Siebel application, you can also find instructions for migrating your customized online help.

The following topics are included:

- [“Location of Employee Application Help Files” on page 18](#)
- [“Online Help and Siebel Tools” on page 21](#)
- [“Customizing and Adding Help” on page 29](#)
- [“Migrating Help” on page 33](#)

NOTE: The help implementation is identical for employee and partner applications. Therefore, the information contained in the topics above applies to both employee and partner applications.

Location of Employee Application Help Files

The location of the help files is determined by the location where you installed your Siebel applications and by the type of Siebel client:

- [Siebel Web Client](#)
- [Siebel Dedicated Web Client and Siebel Mobile Web Client on page 19](#)

Siebel Web Client

Siebel Web Client runs in a standard browser from the client personal computer and does not require any additional persistent software installed on the client. The browser connects through a Web server to the Siebel eBusiness Application server, which executes business logic and accesses data from the Siebel Database.

In this implementation, help files are installed in the following location on the server:

< install dir > \public\ < install language > \help, where

- *install dir* is the directory where you installed the Siebel Web Server Extensions
- *install language* is the language you selected during installation

During the installation process, your Web server is configured so that *< install dir > \public\ < install language > * becomes the root directory for the URL *http:// < hostname > / < Siebel application name >*

When a Help Identifier property in a Screen object maps to a URL in the Help Id object, that URL is relative to *http:// < hostname > / < Siebel application name > .*

Example

If you are running Siebel Call Center on the server *siebsrvr*, when you request the help for the Accounts screen, the page that will appear is *http://siebsrvr/callcenter/help/siebaccounts.htm*. This means that you can put the help files in any directory that can be referenced from *http:// < hostname > / < Siebel_application_name > .*

Assume that in `<install dir> \public\ <install language> \`, you create a directory called `customizedhelp` and you create a new help topic file for the Accounts screen, called `accountshelp.htm`. After that, you configure your Web server so that this directory is exposed to a Siebel application user. In this case, you would create Help Id objects that point to the URL `customizedhelp`; the Help Id object properties would be:

Property	Value
Name	ID_SCREEN_ACCOUNTS
Project	Repository Help Id
Type	Screen
HTML Help URL	customizedhelp/accountshelp.htm

Siebel Dedicated Web Client and Siebel Mobile Web Client

Siebel Dedicated Web Client is a Microsoft Windows client delivered through a Web browser that provides direct connectivity to a database server. It requires software to be installed on the client machine, but does not require a local database, Web server, or Siebel eBusiness Application server for serving up interactive user sessions. Siebel Server is still required for functionality like Territory Assignment Manager.

Siebel Mobile Web Client is a portable Microsoft Windows client delivered through a Web browser that is designed for local data access and does not need to be connected to a server. Siebel Mobile Web Client meets the needs of field professionals who do not have continuous access to a network. Siebel Mobile Web Client uses a local database on each mobile machine. Periodically, the client must access the Siebel Remote Server through a dial-up, WAN, or LAN connection to synchronize data changes with the Siebel Database on the database server and Siebel File System. This client requires installation of Siebel software on the user's personal computer.

The software installed on the user's machine for the Siebel Dedicated Web Client and Siebel Mobile Web Client is identical—the only difference is the type of connectivity provided.

In these implementations, the location of the help files is determined by the installation directory on the client:

<install path> \public\ <install language> \help, where

- *install path* is the complete path to the location where you installed the Siebel application
- *install language* is the language you selected during installation

For example, D:\sea\webclient\public\enu\help.

During the installation process, your local Web server is configured so that *<install path> \public\ <install language> * becomes the root directory for the URL <http://localhost/>.

When a Help Identifier property in a Screen object maps to a URL in the Help Id object, that URL is relative to http://localhost.

Example

If you are running Siebel Call Center on your local machine, when you request the help for the Accounts screen, the page that will appear is <http://localhost/help/siebaccounts.htm>. This means that you can put the help files in any directory that can be referenced from <http://localhost/>.

Assume that in *<install path> \public\ <install language> *, you created a directory called *customizedhelp* and you created a new help topic file for the Accounts screen, called *accountshelp.htm*.

In this case, you would create Help Id objects that point to the URL *customizedhelp*; the Help Id object properties would be:

Property	Value
Name	ID_SCREEN_ACCOUNTS
Project	Repository Help Id
Type	Screen
HTML Help URL	customizedhelp/accountshelp.htm

Online Help and Siebel Tools

In Siebel Tools, Screen, View, and Help Id objects are used to establish the link between a screen or a view and a help topic file.

NOTE: Standard Siebel eBusiness Applications do not contain view-level help topic references; they are all at the screen level. See [“Implementing Help for a View” on page 26](#) for instructions about adding view-level help references.

The following topics are included:

- [“Screen and View Objects”](#)
- [“Help Id Objects” on page 22](#)
- [“Help Properties of Screens and Views” on page 22](#)
- [“Implementing Help for a Screen” on page 24](#)
- [“Implementing Help for a View” on page 26](#)
- [“Changing the Keyboard Shortcut for Accessing Help” on page 27](#)
- [“Help Menu Items” on page 28](#)

Screen and View Objects

Each Screen and View object has a Help Identifier property that is used to establish the link with the Help Id object.

The format of the Help Identifier property is `ID_type_objdefname`, where:

- *type* is SCREEN or VIEW
- *objdefname* identifies the screen or view

Help Id Objects

Each Help Id object has a HTML Help URL property that is used to identify the HTML file that contains the help topics for the screen or the view by mapping the Help Identifier to a specific URL. You can use the same value for the HTML Help URL property for different Help Id objects.

The format of the HTML Help URL property is *help/helptopics.htm*, where:

- *help* is the server folder where the HTML topic files reside
- *helptopics.htm* is the HTML file that appears when a user invokes help

See [“Location of Employee Application Help Files” on page 18](#) for additional information about where the help files are installed.

Help Properties of Screens and Views

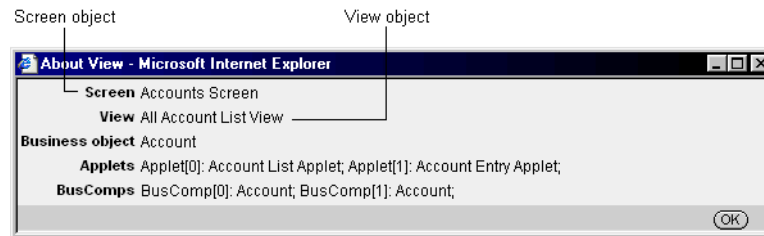
To determine which HTML file contains the help topics for a screen or a view you must: use your Siebel application to determine the Screen or View object used in the screen or view, then use Siebel Tools to find the Help Identifier property of the Screen or View object and then find the corresponding HTML Help URL property in the Help Id object.

NOTE: Some screens are associated with generic help topics. In this case, you must use a different file name if you want to customize the help. See [“Customizing Help for Screens with Generic Help Topic Files” on page 29](#) for instructions.

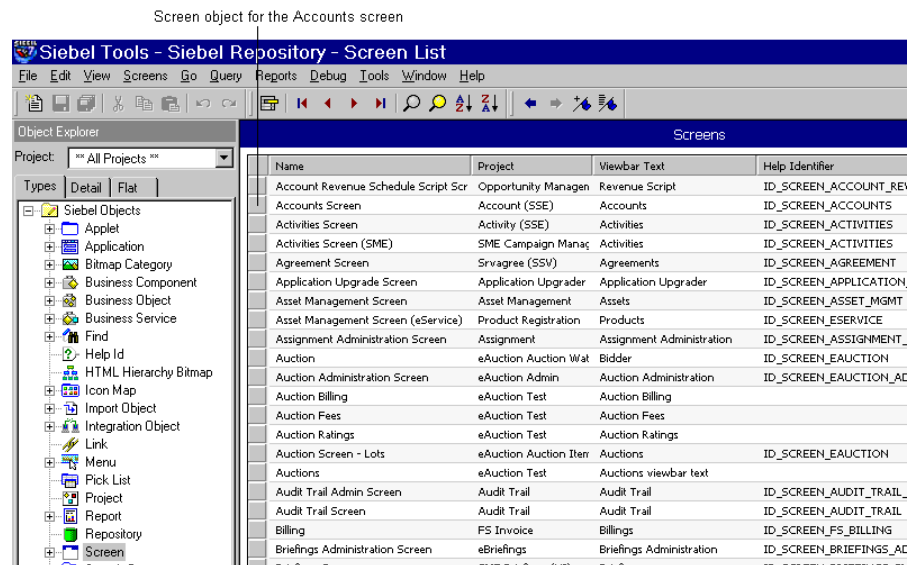
Example

To determine which HTML file contains the help topics for the Accounts screen, you must find which Screen object is used in the Accounts screen.

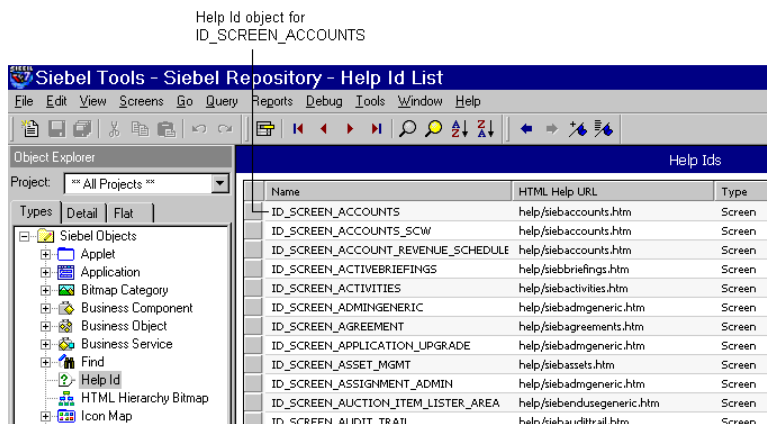
To do this, in your Siebel eBusiness Application, navigate to the Accounts screen, then choose Help > About View to access the About View dialog box, shown below.



In Siebel Tools, find the Accounts screen object and find the value of its Help Identifier property (ID_SCREEN_ACCOUNTS) in the Object List Editor window, shown below.



When you know the value of the Help Identifier property of the Screen object (ID_SCREEN_ACCOUNTS), you can find the value of the Help Id object's HTML Help URL property (help/siebacounts.htm) in the Object List Editor window, as shown below.



Implementing Help for a Screen

If you add a custom screen in your implementation of Siebel eBusiness Applications, you can create help for that screen. To do this, you must use Siebel Tools to define the Screen object with a Help Identifier property, and then add a Help Id object with a HTML Help URL property for the screen. The documentation team can develop the content using the name of the file that will be distributed to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

To add help for a new screen

- 1 In Siebel Tools, if the Screen object does not exist, create it.
See *Siebel Tools Reference, MidMarket Edition* for instructions.
- 2 In the Screen object, define the Help Identifier property.
For example, ID_SCREEN_MYNEWSCREEN.

- 3** Create a new Help Id object with the following properties:

Property	Value	Example
Name	Value of the Help Identifier property of the screen	ID_SCREEN_MYNEWSCREEN
Project	Repository Help Id	Repository Help Id
Type	Screen	Screen
HTML Help URL	Name of the file that will contain the help content	help/mynewscreen.htm

- 4** Recompile the repository file.
- 5** Create a new HTML file with help content for the screen.
- 6** Save the HTML file using the name defined in the HTML HELP URL property of the Help Id object associated with the screen.

For example, mynewscreen.htm.

- 7** Test your changes and distribute the repository file and the new HTML file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

For example, for Siebel Web Client implementations, copy mynewscreen.htm to the correct Siebel Server location
(*< install dir >* \public\ *< install language >* \help).

For more information, see [“Testing and Distributing Changes” on page 16](#).

Implementing Help for a View

To add help for a view, you must use Siebel Tools to define the View object with a Help Identifier property, and then add a Help Id object with a HTML Help URL property for the view. At the same time, the documentation team can develop the content, and they can use the name of the file that will be distributed to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

To add help for a view

- 1 In Siebel Tools, if the View object does not exist, create it.

See *Siebel Tools Reference, MidMarket Edition* for instructions.

- 2 In the View object, define the Help Identifier property.

For example, for the Opportunity Detail - Contacts View, use ID_VIEW_OPPORTUNITY_DETAIL_CONTACTS as the Help Identifier.

NOTE: If you leave the Help Identifier property blank for the View object, the Screen-specific help will be used as the default help topic for the view.

- 3 Create new Help Id object with the following properties:

Property	Value	Example
Name	Value of the Help Identifier property of the view	ID_VIEW_OPPORTUNITY_DETAIL_CONTACTS
Project	Repository Help Id	Repository Help Id
Type	View	View
HTML Help URL	Name of the file that contains the help topics	help/siebopportunities_detailcontacts.htm

- 4 Recompile the repository file.
- 5 Create a new HTML file with the help content for the view.

- 6 Save the HTML file using the name defined in the HTML HELP URL property of the Help Id object associated with the view.

For example, siebopportunities_detailcontacts.htm.

- 7 Test your changes and distribute the repository file and the new HTML file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

For example, for Siebel Web Client implementations, copy siebopportunities_detailcontacts.htm to the correct Siebel Server location (`<install dir> \public\ <install language> \help`).

For more information, see [“Testing and Distributing Changes” on page 16](#).

Changing the Keyboard Shortcut for Accessing Help

Since most users are accustomed to accessing help by pressing the F1 key, you may want to map F1 to display online help in your Siebel application. To do this, you must add an accelerator in Siebel Tools.

To change the keyboard shortcut for accessing help

- 1 In Siebel Tools, select the Command object type in the Object Explorer.

The Commands list appears in the Object List Editor.

- 2 In the Commands list in the Object List Editor, find the Contents Help (SWE) command object and select the row.

- 3 In the Object Explorer, click Accelerator.

The Accelerators list appears below the Commands list in the Object List Editor.

- 4 Change the two Accelerator objects as shown below:

Name	Display Name	Key Sequence
1	F1	F1
2	F1	F1

- 5 Recompile the repository file.
- 6 Distribute the repository file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

Help Menu Items

If you create a new application using Siebel Tools, you can add options to the Help menu in your application. For example, you may want to add an option that allows the user to access the *Bookshelf* from within the application.

The Help application menu option is configured using the Command and Menu objects.

The Command object created for online help is Contents Help (SWE).

See *Siebel Tools Reference, MidMarket Edition* for instructions about using the Command and Menu objects.

Customizing and Adding Help

You can customize help content included for a screen to suit your Siebel implementation and requirements. Standard Siebel eBusiness Applications do not include help files for views. If you want to add help at the view level, you must implement help for the view and then create a new HTML file with the help content for the view. See [“Implementing Help for a View” on page 26](#) for instructions.

The following topics are included:

- [“Customizing Help for Screens with Generic Help Topic Files”](#)
- [“Customizing Help Content” on page 30](#)
- [“Adding Help for a Screen” on page 30](#)
- [“Adding Help for a View” on page 31](#)
- [“Customizing the Help Index” on page 31](#)

Customizing Help for Screens with Generic Help Topic Files

Some screens are associated with generic help topics, which means that the HTML Help URL property of the Help Id object for a screen is one of the following:

- `help/siebadmgeneric.htm` for administrative screens
- `help/siebendusegeneric.htm` for end user screens

See [“Help Properties of Screens and Views” on page 22](#) for information about finding the HTML Help URL property.

To customize help for screens with generic help content

- 1** Open the HTML file referenced in the HTML Help URL property (`siebendusegeneric.htm` or `siebadmgeneric.htm`).
- 2** Save the file with a different name.
- 3** In Siebel Tools, update the HTML Help URL property of the Help Id object to reflect the new file name.
- 4** Follow the instructions in [“Customizing Help Content” on page 30](#).

Customizing Help Content

Since the help consists of HTML pages, you can use any HTML editor to change the content of a help topic.

To customize help content for a screen

- 1 Find the HTML Help URL property associated with the screen.

See [“Help Properties of Screens and Views” on page 22](#) for instructions.

For example, the HTML Help URL property for the Opportunities screen is `help/sieboopportunities.htm`.

NOTE: If the HTML Help URL property for the screen is `siebendusegeneric.htm`, `siebadmgeneric.htm`, or `siebstarthelp.htm`, use the instructions in [“Customizing Help for Screens with Generic Help Topic Files” on page 29](#) instead.

- 2 Open the HTML file, make your changes, and save the file.

For example, open `sieboopportunities.htm`, make your changes, and save the file.

- 3 Test your changes and distribute the updated HTML file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

For example, for Siebel Web Client implementations, copy `sieboopportunities.htm` to the correct Siebel Server location
(`<install dir> \public\ <install language> \help`).

For more information, see [“Testing and Distributing Changes” on page 16](#).

Adding Help for a Screen

If you added a custom screen to your implementation of Siebel eBusiness Applications, you can add help for that screen. See [“Implementing Help for a Screen” on page 24](#) for instructions.

Adding Help for a View

To add help for a view, you must name the HTML topic file using the HTML Help URL property of the view. See [“Implementing Help for a View” on page 26](#) for instructions.

Customizing the Help Index

The index topic in the help system allows the user to find topics by keyword (see [“To search the help by keyword” on page 13](#)). The index topic is a set of links to topics based on keywords. When you customize the content of the help system, you may want to update the entries in the index to reflect the new content. Another option would be to remove access to the index topic entirely.

To customize the help index

- 1** Open siebindex.htm, make your changes, and save the file.
- 2** Test your changes and distribute the updated siebindex.htm to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

For example, for Siebel Web Client implementations, copy the updated siebindex.htm to the correct Siebel Server location
(*< install dir > \public\ < install language > \help*).

For more information, see [“Testing and Distributing Changes” on page 16](#).

To remove access to the index topic

- 1 Open one of the HTML files, except siebindex.htm, that is part of the help system.
- 2 Search for the following block of statements:

```
<script>
/*createButton(TYPE,STATE,LABEL,ACTION)*/
createButton('BTN',1,"Contents",'siebstarthelp.htm');
createButton('BCK',1,"Back",'');
createButton('FWD',1,"Forward",'');
createButton('BTN',1,"Index",'siebindex.htm');
writeButtons();
</script>
```

- 3 Delete the statement that references the index file:

```
createButton('BTN',1,"Index",'siebindex.htm');
```

The statement block should look like this:

```
<script>
/*createButton(TYPE,STATE,LABEL,ACTION)*/
createButton('BTN',1,"Contents",'siebstarthelp.htm');
createButton('BCK',1,"Back",'');
createButton('FWD',1,"Forward",'');
writeButtons();
</script>
```

- 4 Save your changes.
- 5 Repeat [Step 1](#) through [Step 4](#) for each HTML file in the help system, except siebindex.htm.
- 6 Test your changes and distribute all the updated HTML files to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

For example, for Siebel Web Client implementations, copy all the updated HTML files to the correct Siebel Server location
(*<install dir> \public\<install language> \help*).

For more information, see [“Testing and Distributing Changes” on page 16](#).

Migrating Help

If you customized the online help in Siebel 98 (Version 4), Siebel 99 (Version 5), or Siebel 2000 (Version 6) and the customization was mostly related to task topics, it may be more effective to rewrite the content because the navigation in Siebel eBusiness Applications has changed considerably.

The following topics are included:

- [“Help Migration Options”](#)
- [“Sample Scenario” on page 34](#)
- [“Updating Siebel Topic Files with Custom Content” on page 34](#)
- [“Converting Content to HTML Format Using Siebel File Names” on page 35](#)
- [“Converting Content to HTML Format Using Custom File Names” on page 37](#)

Help Migration Options

There are several ways to migrate customized help content to HTML format:

- Update the Siebel HTML topic file with information from your customized topic file from a previous release.

See [“Updating Siebel Topic Files with Custom Content” on page 34](#).

- Convert existing content to HTML using the file name found in Siebel Tools.

See [“Converting Content to HTML Format Using Siebel File Names” on page 35](#).

- Convert existing content to HTML using a file name of your choice, and update the HTML Help URL property.

See [“Converting Content to HTML Format Using Custom File Names” on page 37](#).

If all users will be running on a MS Windows platform, you can use your current compiled Microsoft Windows help system as the help system for your Siebel application. See [“Using WinHelp” on page 38](#) for more information.

NOTE: In this chapter, *rich text editor* refers to a text editor that supports hidden text and footnotes, such as Microsoft Word.

Sample Scenario

For clarity purposes, the procedures in this section are illustrated by an example that assumes that you customized the help content for the Accounts screen to suit your implementation. In earlier versions of Siebel applications, you would have made these changes in the sa_acct.rtf source topic file.

Updating Siebel Topic Files with Custom Content

You can update the online help with customized information contained in your help system from a previous Siebel release using the Siebel topic files included with your Siebel eBusiness Applications.

Advantages

- Maintains formatting, layout, and navigation elements of the original, Siebel-delivered online help.
- Links to the cascading style sheet remain in place.

Disadvantages

- None

To update the Siebel HTML file with information from a customized .rtf file

- 1** Find the help properties of the screen.

See [“Help Properties of Screens and Views” on page 22](#) for instructions.

In the sample scenario, the HTML Help URL property associated with the Accounts screen is help/siebaccounts.htm.

- 2** Open the HTML file referenced in the HTML Help URL property.

In the sample scenario, open siebaccounts.htm.

- 3** Open the source .rtf file (used to create the help content in the previous version) in a rich text editor.

In the sample scenario, open sa_acct.rtf.

- 4** Use copy and paste functionality to copy content from the .rtf file to the HTML file.

In the sample scenario, copy content from sa_acct.rtf to siebaccounts.htm.

- 5 Apply the appropriate HTML tags to format content and save the HTML file.

See [Chapter 5, “Help Source Files”](#) for a description of the cascading style sheet used in the help.

In the sample scenario, save siebaccounts.htm.

- 6 Test your changes and distribute the updated HTML file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

In the sample scenario, for Siebel Web Client implementations, replace `<install dir> \public\ <install language> \help\siebaccounts.htm` with your version of siebaccounts.htm created from the .rtf file.

For more information, see [“Testing and Distributing Changes” on page 16](#).

Converting Content to HTML Format Using Siebel File Names

If you customized the help content in previous versions of your Siebel application, you can use the method described in this section to convert the customized help content to HTML format. Use your source topic file (rich text format, .rtf) as a starting point and follow the instructions.

Advantages

- The new help content exactly matches the customized content of the previous release.

Disadvantages

- Creates a risk of unexpected formatting results if the person customizing the help is not familiar with HTML.
- Creates risk of losing navigation elements in the help system (to table of contents and index topics) if the correct HTML code is not inserted in the new HTML file.

To convert a customized .rtf file to HTML using the Siebel file name

- 1** Find the help properties of the screen.

See [“Help Properties of Screens and Views” on page 22](#) for instructions.

In the sample scenario, the HTML Help URL property associated with the Accounts screen is help/siebaccounts.htm. The Siebel file name for the topic file is “siebaccounts.htm.”

- 2** Open the source .rtf file (used to create the help content in the previous version) in a rich text editor.

In the sample scenario, open sa_acct.rtf.

- 3** Save the file in HTML format, using the appropriate Siebel file name.

In the sample scenario, save sa_acct.rtf as siebaccounts.htm.

- 4** Open the newly created HTML file.

- 5** In the HTML file, add a reference to the Siebel help cascading style sheet (siebhelp.css) and add the necessary blocks of code to implement the navigation buttons.

NOTE: You can copy this information from one of the Siebel-delivered HTML files.

- 6** Clean up the HTML code to use styles defined in the style sheet and save the HTML file.
- 7** Test your changes and distribute the updated HTML file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

In the sample scenario, for Siebel Web Client implementations, replace `<install dir> \public\<install language> \help\siebaccounts.htm` with your version of siebaccounts.htm.

For more information, see [“Testing and Distributing Changes” on page 16](#).

Converting Content to HTML Format Using Custom File Names

You can use existing content in .rtf format and convert it to HTML using your own file naming convention.

Advantages

- Requires very little work from your help developer or technical writer.

Disadvantages

- Siebel Tools developers have to update the help properties for each topic file that does not use a Siebel name.
- Increases risk of errors because the names of files may be entered incorrectly in Siebel Tools.

To convert existing content to HTML using a file name of your choice

- 1 Open the source .rtf file (used to create the help content in the previous version) in a rich text editor.

In the sample scenario, open sa_acct.rtf.

- 2 Save the .rtf file in HTML format, with a name you choose.

In the sample scenario, save sa_acct.rtf as sa_acct.htm.

- 3 Test your changes by opening the HTML file in a Web browser.

- 4 In Siebel Tools, find the help properties of the screen.

See [“Help Properties of Screens and Views” on page 22](#) for instructions.

- 5 Update the HTML Help URL property of the Help Id object to reflect the correct file name.

In the sample scenario, update the HTML Help URL property for the ID_SCREEN_ACCOUNTS Help ID object to be help/sa_acct.htm.

6 Do one of the following:

- If you only changed HTML Help URL properties, recompile the Repository Help Id project to create an SRF and implement the changes.
- If you made other changes, recompile all affected projects to create an SRF and implement the changes.

7 Test your changes and distribute the repository file and the new HTML file to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

In the sample scenario, for Siebel Web Client implementations, copy sa_acct.htm to the correct Siebel Server location (`<install_dir> \public\<install language> \help`).

For more information, see [“Testing and Distributing Changes” on page 16](#).

Using WinHelp

If all users will be running on a Microsoft Windows platform, you can use your current compiled Microsoft Windows help system (WinHelp) as the help system for your Siebel eBusiness Applications.

It is important to note that this solution is *not recommended* and that there are several drawbacks to this implementation:

- Each time a user invokes help, the Web browser’s File Download dialog box will appear, and the user must respond to access the help. The only way to avoid this is for your administrator to change security settings.
- When a user invokes help at a screen, the default topic in the WinHelp file appears in the help window, not the context-sensitive topic associated with the screen.

In WinHelp, you specify the default topic for the help file in the [OPTIONS] section of the help project file (.hpi). If you do not specify a default topic, WinHelp uses the first topic of the first file listed in the help project (.hpi) file.

- From the help window, the user can access the Index, but the table of contents (usually available through the Contents tab of the Help Topics window) is not available. Microsoft is aware of this problem, but since WinHelp is no longer the Microsoft method of choice for help delivery, Microsoft will not fix this defect.

NOTE: The following procedure assumes that you want to use siebhelp.hlp (a WinHelp file) as the help system for your Siebel eBusiness Applications.

To use a compiled WinHelp file

- 1 In Siebel Tools, update the HTML Help URL property for all Help Id objects to reflect the correct file name.

In this example, update the HTML Help URL property for all Help Id objects to be help/siebhelp.hlp.

- 2 Do one of the following:
 - If you only changed HTML Help URL properties, recompile the Repository Help Id project to create an SRF and implement the changes.
 - If you made other changes, recompile all affected projects to create an SRF and implement the changes.
- 3 Distribute the repository file and the help file (Windows compiled help file) to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

For example, for Siebel Web Client implementations, distribute the repository file and copy siebhelp.hlp to the correct Siebel Server location (*< install dir > \public\ < install language > \help*).

The topics in this section describe the details of the help implementation in Siebel 7 customer applications. It explains the location of the help files and provides information about using Siebel Tools to verify the calls to the online help. In addition, instructions are included for customizing the help content and migrating your existing customized online help from earlier versions.

The following topics are included:

- [“Location of Customer Application Help Files” on page 42](#)
- [“Online Help and Siebel Tools” on page 43](#)
- [“Changing Help Links” on page 44](#)
- [“Adding Help Links for New Applications” on page 45](#)
- [“Customizing Help Content” on page 47](#)
- [“Adding Help Content” on page 48](#)
- [“Migrating Help” on page 49](#)

Location of Customer Application Help Files

The location of the help files is determined by the location where you installed your Siebel applications.

Help files are installed in the following location on the server:

<install dir> \public\ <install language> \help, where

- *install dir* is the directory where you installed the Siebel Web Server Extensions
- *install language* is the language you selected during installation

During the installation process, your Web server is configured so that

*<install dir> \public\ <install language> *
becomes the root directory for the URL
http:// <hostname> / <Siebel application name>

When the Value property of the Url Web Page Item Parameter maps to a URL, that URL is relative to *http:// <hostname> / <Siebel application name>* .

For example, if you are running Siebel eSales on the server siebsrvr, when you request help, the page that will appear is
http://siebsrvr/esales/help/comgeneric.htm. This means that you can put the help files in any directory that can be referenced from
http:// <hostname> / <Siebel_application_name> .

For example, assume that in *<install dir> \public\ <install language> *, you create a directory called customizedhelp and you create a start page for your help system, called myonlinehelp.htm. After that, you configure your Web server so that this directory is exposed to your application users. In this case, you would create a Web Page Item Parameter object definition that points to the URL customizedhelp; the Web Page Item Parameter object properties would be:

Property	Value
Name	Url
Value	customizedhelp/myonlinehelp.htm

Online Help and Siebel Tools

In Siebel Tools, a container Web Page object is used to establish the link between an application and its help start page, as shown in [Figure 3](#).

Each Application object has a Container Web Page property which represents a Web Page object. Each Web Page object contains Web Page Item objects. The HelpButton Web Page Item has one parameter that identifies the start page of the help system for the application.

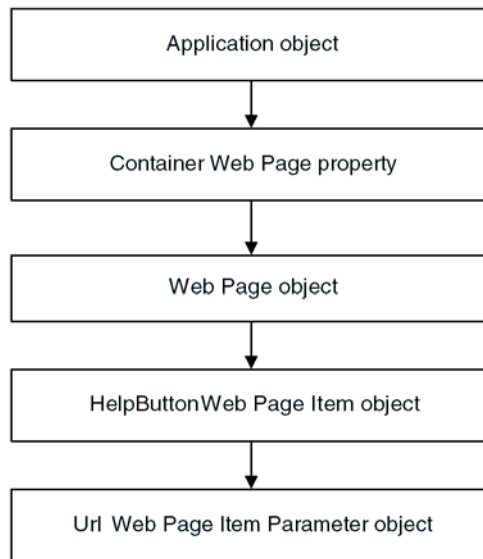


Figure 3. Establishing the link between an application and help

Changing Help Links

If you want to use a different start page for the help, you can change the help link for the application.

To change a help link

- 1** In Siebel Tools, in the Object Explorer (Types tab) select the Application object type.
- 2** In the Object List Editor, find the Container Web Page that the application uses.
- 3** In the Object Explorer (Types tab), select the Web Page object type.
- 4** In the Object List Editor, find and select the Web Page object definition that uses the Container Web Page.
- 5** In the Object Explorer (Types tab), expand the Web Page object type and select the Web Page Item object type.
- 6** In the Object List Editor, select the HelpButton Web Page Item object definition, and in the Object Explorer (Types tab), expand the Web Page Item object to expose and select the Web Page Item Parameter object type.
- 7** In the Url Web Page Item Parameter object definition, change the Value property to reflect the name of the HTML file you want to use as a start page.

For example, help/index.htm.

- 8** Recompile to create an updated SRF.
- 9** Optionally, in the HTML file you want to use as a start page, add a reference to the Siebel help cascading style sheet (siebhelp.css) and add the necessary code to implement the navigation buttons.

NOTE: You can use help/siebcomgeneric.htm as an example.

- 10** Distribute the repository file and the new HTML file to the appropriate Siebel Server.

Adding Help Links for New Applications

If you create a new application using Siebel Tools, you can add help links to your application.

To add a help link

- 1** In Siebel Tools, in the Object Explorer (Types tab) select the Application object type.
- 2** In the Object List Editor, find the value of the Container Web Page property for the Application object.

For example, the Container Web Page property of the Siebel eSales Application object is CC Container Page (eSales). Container Web pages map to the Web Page object in Siebel Tools.

- 3** In the Object Explorer (Types tab), select the Web Page object type.
- 4** In the Object List Editor, find and select the Web Page object definition that uses the Container Web Page.
- 5** In the Object Explorer (Types tab), expand the Web Page object type to expose the Web Page Item object type.
- 6** In the Object List Editor, create a new Web Page Item object definition with the following properties:

Property	Value
Name	HelpButton
Type	Link
Caption	Help
Method Invoked	GotoURL
Item Identifier	A number between 11 and 19 that is not used by another Web Page Item object definition.
HTML Attribute	target = “_blank”

- 7** In the Object List Editor, select the Web Page Item object definition you created, and in the Object Explorer (Types tab), expand the Web Page Item object to expose the Web Page Item Parameter object type.
- 8** Create a Web Page Item Parameter object definition with the following properties:

Property	Value
Name	Url
Value	help/siebcomgeneric.htm siebcomgeneric.htm is the default start page for the help system. You can change this parameter to point to a different file, for example, index.htm.

- 9** Recompile to create an updated SRF.
- 10** Distribute the repository file to the appropriate Siebel Server.
- 11** If you are using a different start page, test your changes and upload the new HTML file to the Siebel Server.

For more information, see [“Testing and Distributing Changes” on page 16](#).

Customizing Help Content

Since the help consists of HTML pages, you can use any HTML editor to change the content of a help topic.

To customize help content

- 1** Find the HTML file you want to change.
For a list of source files, see [Chapter 5, “Help Source Files.”](#)
- 2** Open the HTML file, make your changes, and save the file.
- 3** Test your changes and update the HTML file on the Siebel Server.
For more information, see [“Testing and Distributing Changes” on page 16.](#)

Adding Help Content

You can add help content in the existing HTML files, as explained in [“Customizing Help Content” on page 47](#), or you can add new HTML files to complement the existing content. If you add new HTML files, you must add links to these new files from the existing files to ensure that your users will be able to access the content.

To add help content by adding HTML files

- 1 Create the new HTML file with your content.

TIP: Start with one of the files included in the Siebel help system to avoid losing style specifications.

- 2 Test your changes.

For more information, see [“Testing and Distributing Changes” on page 16](#).

- 3 Upload the HTML file to the Siebel Server.

For the exact location of the help files, see [“Location of Customer Application Help Files” on page 42](#).

Migrating Help

You can update the online help with customized information contained in your help system from a previous Siebel release by using the Siebel topic files included with your Siebel eBusiness Applications.

To update the Siebel HTML file with information from a customized HTML file

- 1** Find the name of the HTML file to update and open the file.

See [“Customer Applications Files” on page 61](#) for a complete list of files.

- 2** Open the HTML file used to create help content in the previous version.

If you used the Siebel file name in earlier releases, the file name would be Siebel_eBusiness_Help.htm.

- 3** Use copy and paste functionality to update the Siebel HTML file.
- 4** Apply appropriate HTML tags to format content and save the HTML file.
- 5** Test your changes and update the HTML file on the Siebel Server.

For more information, see [“Testing and Distributing Changes” on page 16](#).

The topics in this section provide information about deploying online help in different languages.

The following topics are included:

- [“Language Folders” on page 52](#)
- [“Localizing Online Help” on page 53](#)

For additional information about global deployment, see *Global Deployment Guide, MidMarket Edition*.

Language Folders

Your Siebel application comes with localized online help. Localized online help files are located in the language-specific folders on either the server or the Mobile or Dedicated Web client.

Help files are installed in the following location on the server:

<install dir> \public\ <install language> \help, where

- *install dir* is the directory where you installed the Siebel Web Server Extensions
- *install language* is the language you selected during installation

For details about the location of the help files for different Siebel applications, see [“Location of Employee Application Help Files” on page 18](#) and [“Location of Customer Application Help Files” on page 42](#).

Localizing Online Help

If you are deploying your Siebel application in a language not available from Siebel Systems, Inc., and you want to deploy online help in that language, you must localize the online help. [Figure 4](#) shows the typical steps involved in help localization.

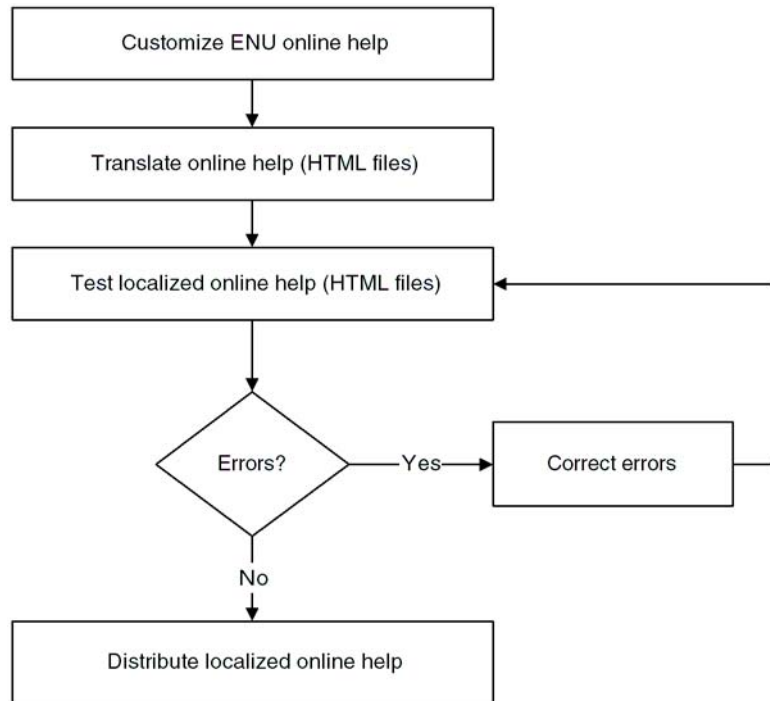


Figure 4. Help Localization Steps

To localize online help

- 1** (Optional) Customize the ENU (American English) help to suit your implementation.
- 2** Translate the HTML source files (that make up the help system) by modifying the flat files directly.
- 3** Test and distribute the localized online help to the appropriate Siebel Servers, Siebel Mobile Web Clients, and Siebel Dedicated Web Clients.

The following topics list the source files that make up the help system for the employee, partner, and customer applications.

- [“Employee Applications Files” on page 56](#)
- [“Customer Applications Files” on page 61](#)
- [“Cascading Style Sheet and JavaScript” on page 63](#)

Employee Applications Files

The help system for employee applications consists of HTML files (listed under [HTML Files](#)), image files (listed under [Image Files on page 58](#)), a cascading style sheet (siebhelp.css), and a JavaScript file (siebhelp.js). The cascading style sheet and the JavaScript file are described in [“Cascading Style Sheet and JavaScript” on page 63](#).

HTML Files

In the HTML files that make up the help system, there are many files that have generic content (based on siebendusegeneric.htm). With the files already in place, you can simply use the existing file to customize the content to suit your implementation. The following table lists the files that do not have generic content.

File Name	Description
siebbasicscontrols.htm	Using Field Controls
siebbasicscontrolscal.htm	Selecting Date and Time Information
siebbasicscontrolscurr.htm	Using the Currency Calculator
siebbasicsdata.htm	Working with Data
siebbasicsdatatoc.htm	Table of contents: Working with Data
siebbasicskbshortcuts.htm	Using Keyboard Shortcuts
siebbasicsnav.htm	Navigating the Application
siebbasicsselectiondb.htm	Using Selection Dialog Boxes
siebcalendar.htm	Using the Calendar
siebcharts.htm	Using Charts
siebcorrespondence.htm	Using Siebel Correspondence
siebcorrespondencetoc.htm	Table of contents: Using Siebel Correspondence
siebendusegeneric.htm	Generic topic for end user screens
siebfindinginfotoc.htm	Table of contents: Finding Information
siebhomepage.htm	Using the Home Page

File Name	Description
siebhomepagetoc.htm	Table of contents: Using the Home Page
siebindex.htm	Help Index
siebliterature.htm	Working with Literature
siebliteraturetoc.htm	Table of contents: Working with Literature
sieboptions.htm	Setting User Options
sieboptionstoc.htm	Table of contents: Setting User Options
siebpaging.htm	Siebel Paging help topics
siebquery.htm	Using Queries
siebquerytoc.htm	Table of contents: Using Queries
siebreports.htm	Working with Reports
siebreportstoc.htm	Table of contents: Working with Reports
siebsearch.htm	Using the Siebel Search Center
siebsearchtoc.htm	Table of contents: Using the Siebel Search Center
siebstarthelp.htm	Start page (main table of contents)
siebsynch.htm	Synchronizing Data
siebsynchtoc.htm	Table of contents: Synchronizing Data
siebuserinterfacetoc.htm	Table of contents: Understanding the User Interface
siebusingscalendartoc.htm	Table of contents: Using the Calendar
siebwelcome.htm	Welcome to Siebel Online Help

Image Files

The following table lists the image files used in the help system.

File Name	Description
arw_bck_1.gif	Application icon
arw_fwd_1.gif	Application icon
btn_cls_d.gif	Used to create buttons
btn_mid.gif	Used to create buttons
btn_opn_d.gif	Used to create buttons
cal_analroadevent.gif	Application icon
cal_appointment.gif	Application icon
cal_calls.gif	Application icon
cal_diagnosis.gif	Application icon
cal_events.gif	Application icon
cal_presentation.gif	Application icon
cal_projectmilestone.gif	Application icon
cal_repairmaint.gif	Application icon
cal_salescall.gif	Application icon
cal_travel.gif	Application icon
calculatoricon.gif	Application icon
calendactivity.gif	Application icon
calendarselect.gif	Application icon
cl_book.gif	Closed book
closesearchbutton.gif	Application icon
col_movedown.gif	Application icon
col_moveleft.gif	Application icon

File Name	Description
col_moveleftall.gif	Application icon
col_moveright.gif	Application icon
col_moverightall.gif	Application icon
col_movetobottom.gif	Application icon
col_movetotop.gif	Application icon
col_moveup.gif	Application icon
collapse.gif	Application icon
ddlist.gif	Application icon
deleteicon.gif	Application icon
executequeryicon.gif	Application icon
expand.gif	Application icon
hide.gif	Application icon
home.gif	Application icon
lessmore.gif	Application icon (Show less)
menubutton.gif	Application icon
moreless.gif	Application icon (Show more)
movedown.gif	Application icon
moveup.gif	Application icon
newqueryicon.gif	Application icon
nxt_0_d.gif	Used to create buttons
nxt_1_d.gif	Used to create buttons
op_book.gif	Open book
page.gif	Page icon
prv_0_d.gif	Used to create buttons
prv_1_d.gif	Used to create buttons

File Name	Description
recordnav.gif	Application icon
return.gif	Back to top
saveicon.gif	Application icon
screentabbuttons.gif	Application icon
searchbutton.gif	Application icon
selecticon.gif	Application icon
show.gif	Application icon
sitemapicon.gif	Application icon
sort.gif	Application icon
sortascending.gif	Application icon
sortascendingdone.gif	Application icon
sortdescending.gif	Application icon
tabjump.gif	Application icon
tabjumpenabled.gif	Application icon
top.gif	Back to top

Customer Applications Files

The help system for customer applications consists of HTML files (listed in [HTML Files](#)), image files (listed in [Image Files on page 62](#)), a cascading style sheet (siebhelp.css), and a JavaScript file (siebhelp.js). The cascading style sheet is described in [“Cascading Style Sheet and JavaScript” on page 63](#).

HTML Files

The following table lists the HTML files that make up the customer application help system.

File Name	Description
siebcomcontactus.htm	Contacting Us
siebcomfindinginfo.htm	Finding Information
siebcomgeneric.htm	Start page (main table of contents)
siebcomgenericcontactustoc.htm	Table of contents: Contacting Us
siebcomgenericfindinginfotoc.htm	Table of contents: Finding Information
siebcomgenericlogintoc.htm	Table of contents: Logging In
siebcomgenericregistrationtoc.htm	Table of contents: Registration
siebcomgenericuserinterfacetoc.htm	Table of contents: Understanding the User Interface
siebcomloggingin.htm	Logging In
siebcomregistration.htm	Registration
siebcomsearch.htm	Using Search
siebcomupdatinguserprofile.htm	Updating Your User Profile
siebcomuserinterface.htm	Understanding the User Interface
siebcomwwattachments.htm	Viewing Attachments

Image Files

File Name	Description
calculatoricon.gif	Application icon
calendarselect.gif	Application icon
cl_book.gif	Closed book
op_book.gif	Open book
recordnav.gif	Application icon
selecticon.gif	Application icon
sort.gif	Application icon
sortascendingdone.gif	Application icon
top.gif	Back to top

Cascading Style Sheet and JavaScript

Siebel online help uses a cascading style sheet ([siebhelp.css](#)) and a JavaScript file ([siebhelp.js](#)) to control the appearance of the help pages and to create navigation buttons in each file.

siebhelp.css

The formatting of the help pages in Siebel online help is managed with a cascading style sheet (siebhelp.css). A cascading style sheet includes typographical and formatting information on how the Web page should appear, such as the text font. A cascading style sheet gives the author control over the appearance of the page.

The following table describes each tag and class for which formatting is defined in siebhelp.css.

Tag/Class	Description
BODY tag	Defines the default formatting for all the text in all the HTML files that make up the help system.
P tag	Used for all paragraphs in all the HTML files that make up the help system.
H1 tag	Used for the main title of a set of topics contained in one HTML file in the help system.
H2 tag	Used for second-level topic titles within HTML files in the help system. In addition, H2 tags are used for the letter navigation bars in the index file of the employee applications help.
H3 tag	Used for subheadings within topics, such as “See Also” sections. In addition, H3 tags are used for the group heading letters in the index file of the employee applications help.
H4 tag	Used to format lower-level headings.
H5 tag	Used for all procedure headings in the HTML files that make up the help system (for example, for the “To add a record” procedure heading).
HR tag	Used in all HTML files to add a blue horizontal separation line between topics.

Tag/Class	Description
TD tag	Defined in the style sheet to set font size for table text. The tag is used for all table text in all the HTML files that make up the help system.
TR tag	Defined in the style sheet to set the vertical alignment of all the content of all table cells to “top.”
OL tag	Defined in the style sheet to reduce the standard ordered list indentation.
UL tag	Defined in the style sheet to reduce the standard unordered list indentation.
P.BacktoTop class	Used to reduce the spacing for the separation lines, with the back to top navigation icon, between topics in an HTML file.
P.index01 class	Used for first-level index entries in siebindex.htm in the employee applications help.
P.index02 class	Used for second-level index entries in siebindex.htm in the employee applications help. These entries are indented from the main index entries.
.minibutton class	Used for formatting of navigation buttons (Contents, Back, Forward, and Index), created using JavaScript. Applies to employee applications help system only.
.minibuttonOn class	
.minibuttonOff class	

siebhelp.js

The online help for employee applications uses a JavaScript file (siebhelp.js) to display navigation buttons (Contents, Back, Forward, and Index) at the beginning and the end of each help topic file.

Each HTML source file in the employee applications help system has a statement that references the siebhelp.js file and also contains a set of script statements to create the buttons at the start and end of each HTML page.

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