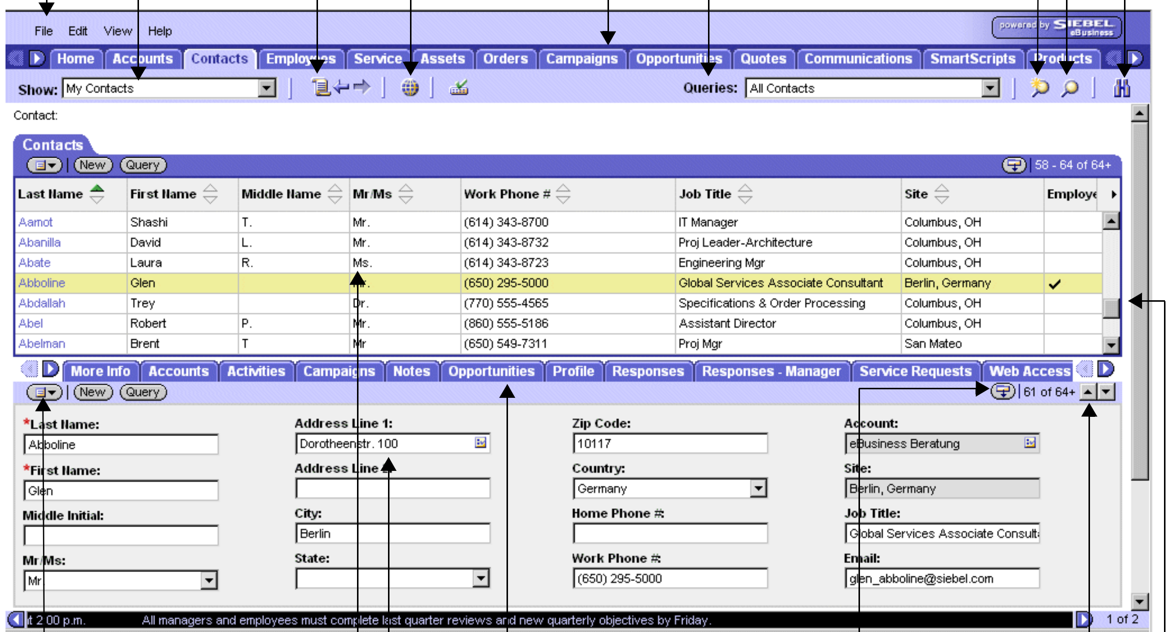
Siebel Application Window



Navigation

Screen tabs. Screen tabs are located at the top of the application window and represent the main screens in your application. Click a screen tab to access the corresponding screen.

Site Map. The screen tabs that appear within the application window are determined by your configuration settings. These tabs may represent only a subset of all screens available to you. To access all available screens, use the Site Map (View > Site Map). The Site Map provides hyperlinks to all screens and views available to you.

Show drop-down list. After clicking a screen tab, use the Show drop-down list to filter the set of records in the screen. For example, to see all contact records, click the Contacts screen tab and select All Contacts from the Show drop-down list. The records appear in a list.

View tabs. Click a view tab to to see additional information related to the selected record. The selection of view tabs depends on the information available for the active record and on your implementation of the Siebel application.

Subview. Subviews display additional detail about a record selected within a view. Subviews appear directly below a view. *Not all views have subviews.*

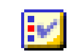
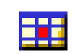
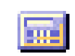
NOTE: Use the tab jump buttons, at each end of the row of visible screen tabs or view tabs, to access additional tabs.

Records and Fields

A record is a collection of data organized into fields. For example, a contact record consists of fields such as name, work phone, job title, and email address; a service request record consists of fields such as defect number, type, severity, and priority.

- In a list, records are shown as rows.
- A form displays the fields of a single record.
- You can add a record by clicking the New button in a list or form, or by clicking the menu button in any list or form, and then clicking New Record.

Click in a field to enter or edit text in the field. Required fields in a record contain a red asterisk. Lists and forms contain field controls for adding data.

Field Control	Purpose
	Click the drop-down arrow in a field to select from a list of values for that field.
	Click the select button in a field to access a selection dialog box that provides a list of items that have already been stored in the database. Select an item to enter data in the field.
	Click the calendar button in a date field to access a dialog box for entering date and time information.
	Click the calculator button in a field to access a calculator for entering numerical data.

Saving Data

When you create new records or make changes to existing records, you can save your changes. If you "step off" (leave) the record, your changes will automatically be saved. You can also click the menu button, and then click Save Record; or, from the application-level menu, you can choose File > Save Record. If you have not saved your changes, you can undo them by clicking the menu button, and then clicking Undo Record.

Searching

The Search Center lets you search for data within your application without losing the current information displayed on your screen.

To create a search

1 Click the search button. 

The Search Center opens.

2 From the Look In drop-down list, select the data type for your search.

3 Enter your search criteria in the fields provided. *Different fields appear, depending on your selection from the Look In drop-down list.*

4 Click Search.

The records that match your search criteria appear in the Results list.

5 Select a record in the Results list and do one of the following:

- Click Preview to view the record in a separate dialog box.
- Click the hyperlink for the record to show the record in the application window.

Querying

The query feature allows you to enter specific query criteria to find records. Operators are used to help define the criteria. Operators are used within a string of text or numbers you are using to locate specific records. Operators can be found in *Online Help* (CTRL + ALT + H) and *Fundamentals, MidMarket Edition*.

To create and run a query in a form or list

1 Click Query in the form or list.

2 Enter query criteria in the blank form or list row.

3 Click Go in the form or list.

To save query criteria

1 Create and run a query.

2 Click the menu button, and then click Save Query As.

3 In the Save Query As dialog box, type a name in the Query Name field, and click OK.

You can now access the saved query from the Queries drop-down list.

Organizing Columns

- You can resize a column by moving your cursor over the border between the column headers. The cursor changes to a resize arrow. Click and drag the border until the column is the desired size.
- Use the Columns Displayed feature to add and remove columns. Click the menu button, and then click Columns Displayed to access the Columns Displayed dialog box. Use the arrow buttons in the Columns Displayed dialog box to add or remove columns.

SIEBEL® 7.5 QUICK REFERENCE CARD, MIDMARKET EDITION

Overview

This quick reference provides fundamental information on the use of the functionality in any Siebel 7.5 application. See *Fundamentals, MidMarket Edition* or *Siebel Online Help* for a further explanation of these topics and other basic features of Siebel 7.5 applications.

Home Page

The first screen you see when you log in to your Siebel application is your home page. Your job responsibilities determine what you see on that page.

Your home page provides information to assist you with your daily activities. You can remove or rearrange the elements of the home page using the controls described in the following table.

Home Page Control	Purpose
	Click to collapse the list or form to its minimum size, showing no records.
	Click to expand the list or form to its standard size.
	Click to move the list or form up on the page to reposition it above other lists or forms. *You can access this control only by clicking the Edit Layout button.*
	Click to move the list or form down on the page to reposition it below other lists or forms. *You can access this control only by clicking the Edit Layout button.*
	Click to hide the list or form and temporarily remove it from the home page.
	Click to show the list or form previously hidden in the home page. *You can access this control only by clicking the Edit Layout button.*

User Preferences

User preferences allow you to set preferences related to the functionality and appearance of your application. Access your user preferences by choosing View > User Preferences from the application-level menu. The following examples describe two views in the User Preferences screen. You may not be able to change certain fields; contact your Siebel administrator for more information.

Calendar. Use the Calendar view in the User Preferences screen to modify your calendar's working hours, define default appointment duration, set up a default calendar view, and so on.

Default Queries. You can define a default query for each screen so that when you access that screen, that query is applied to the data in that screen. Before selecting a default query for a screen, you must first run and save the query. Then access the User Preferences screen. From the Show drop-down list, select Default Queries. Find the screen using the Screen Name list and the Screen View list, and then use the Default Query field to select the query.

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