Siebel CRM

Siebel Mobile Guide: Disconnected

Siebel Innovation Pack 2014 Rev. A

E52427-01

September 2015

ORACLE®

Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014 Rev. A

E52427-01

Contents

4   Siebel Mobile Disconnected Application Administration

5 Data Filtering for Siebel Mobile Disconnected Applications

8 Getting Started with Siebel Mobile Disconnected Applications

x

List of Figures

List of Tables

Preface

This guide covers Siebel Mobile disconnected functionality.

Audience

This guide is intended for users and developers.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle
Accessibility Program website at
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support
through My Oracle Support. For information, visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are
hearing impaired.

Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Siebel Mobile Guide: Connected*
- *Configuring Siebel Open UI*
- *Siebel Installation Guide* for the operating system you are using

Conventions

The following text conventions are used in this document:

Convention	Meaning
italic	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.

1

What's New in This Release

This chapter describes new product features.

What's New in Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014 Rev. A

Table 1–1 lists the changes in this revision of the documentation to support this release of the software.

> **Note:** Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

Table 1–1 New Product Features in Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014 Rev. A

Topic	Description
"Setting Up the Host Server for Siebel Mobile" on page 8-23	New topic. Describes how to set up the host server where Siebel Mobile connected applications are located. This is a required task if using Siebel Mobile version 2.0
"Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24	Modified topic. Describes how to configure the Siebel Mobile Application Container (Siebel app) on an iOS device when using Siebel Mobile version 1.0 and Siebel Mobile version 2.0.
"Clearing the Application Cache for Applications Using the Siebel App" on page 8-27	Modified topic. Describes how to clear the application cache for applications when using Siebel Mobile version 1.0 and Siebel Mobile version 2.0.
"Resetting the Siebel Server or Host Server" on page 8-29	New topic. Describes how to reset the server where Siebel Mobile connected applications are located.
"Managing Attachment Downloads Using the Siebel App" on page 8-29	New topic. Describes how to use the Attachment Management Download view to manage the download of attachments when using Siebel Mobile version 2.0. the Attachment Manager Download view is not available in Siebel Mobile version 1.0.
"Using the PCD Viewer in Siebel Mobile" on page 9-28	Modified topic. The eDetailer Player has been renamed PCD Viewer.

What's New in Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014

Table 1–2 lists the changes described in this version of the documentation to support this release of the software.

> **Note:** Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

Table 1–2   New Product Features in Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014

Topic	Description
"Siebel Mobile Products" on page 2-1	Revised topic. The following Siebel CRM application is now supported for Siebel Innovation Pack 2014: ■ Siebel Mobile Connected Application for Siebel Finance
"MIT License" on page 2-5	New topic. The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded javascript and uses MIT licensing.
"Customizing Siebel Mobile Disconnected Applications" on page 3-20	Revised topic. Siebel Mobile runs on jQuery 2.1 and no longer uses the jQuery Mobile 1.4.0 plug-in.
"Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8	New topic. Describes how to set up the Disconnected Mobile Synchronization component group (MobileSync) for Siebel Mobile disconnected applications. The purpose of this task is to support synchronization in disconnected mode.
"Setting Up Selective Retrieval for Siebel Mobile Disconnected Application Views" on page 3-14	New topic. Setting up selective retrieval for Siebel Mobile application views is a mandatory step for customers who want to restrict the number of views that will be downloaded to user devices and available to users in offline mode.
"Copying and Deleting Siebel Mobile Applications" on page 3-20	New topic. Describes how records are copied and deleted in Siebel Mobile.
"Troubleshooting Your Siebel Mobile Disconnected Application" on page 3-21	Revised topic. Describes how to troubleshoot problems related to the following: ■ Siebel Mobile applications in general. ■ Siebel Mobile disconnected application logging, including how to debug errors using the log console.
"Disabling Private Browsing" on page 3-28	New topic. Describes how to enable and disable private browsing in Safari on iPad. Private browsing must be disabled for Siebel Mobile.
"Setting Up Users for Siebel Mobile Disconnected Applications" on page 4-1	Revised topic. Describes how to set up users for Siebel Mobile disconnected applications.
"Adding Business Object Filters for Siebel Mobile Disconnected Application Users" on page 4-2	New topic. Business object filters are now supported by Siebel Mobile disconnected applications.

Table 1–2   (Cont.) New Product Features in Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014

Topic	Description
"Configuring Access to Views for Siebel Mobile Disconnected Applications" on page 4-2	New topic. Describes how to use the Siebel CRM Local Access Flag to control which views Siebel Mobile users can access when using Siebel Mobile disconnected applications.
"Limiting Access to Views by Modifying Responsibilities" on page 4-3	New topic. Describes how to limit the views that the Siebel Mobile disconnected application displays by modifying access to the view for a user responsibility.
"Limiting Access to Views for All Responsibilities Globally" on page 4-4	New topic. Describes how to limit the views that the Siebel Mobile disconnected application displays by modifying access to the view for all responsibilities globally that reference the view.
"Configuring Synchronization for Siebel Mobile Disconnected Applications" on page 4-14	New topic. You can enable full or incremental synchronization for Siebel Mobile disconnected applications by setting the Siebel Mobile Always Full Sync system preference accordingly as shown in the following procedures: ■ "Enabling Full Synchronization for Siebel Mobile Disconnected Applications" on page 4-14 ■ "Enabling Incremental Synchronization for Siebel Mobile Disconnected Applications" on page 4-15
"Configuring Business Components for Full Synchronization Always" on page 4-16	New topic. Describes how to configure business components for full synchronization always where objects are fully synchronized even if incremental synchronization is enabled for the Siebel Mobile disconnected application.
"Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16	New topic. Describes how to configure batch synchronization for Siebel Mobile disconnected applications.
"Setting Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2	Revised topic. Example business component filters, specific to the Siebel Mobile application for Siebel Pharma, are shown in this topic.
"Configuring Business Component Filters for Pop-up Applets" on page 5-4	New topic. Describes how to configure business component filters for pop-up applets.
"Constructing Business Object Filters for Siebel Mobile Disconnected Applications" on page 5-5	New topic. Describes how to construct business object filters for Siebel Mobile disconnected applications, including what syntax to use, how to set and remove business object filters, how to configure chained data extraction for business object filters, and how to apply filters during chained data extraction.
"Searching for Records in Siebel Mobile" on page 8-9	Revised topic. Describes how to search for records in Siebel Mobile applications. You can filter your search on different fields, including the date. To search for records in Siebel Mobile, you must configure a search control in Siebel Tools for each applet (form or list) where you want the Search bar to appear.
"Reviewing Notification Messages in Siebel Mobile" on page 8-11	Revised topic. Describes how to open, review, close and delete notification messages in Siebel Mobile applications, and how to modify the notification message text in Siebel CRM.
"Uploading a User Profile Image to Siebel Server" on page 8-14	New topic. Describes how to configure a user profile image for the Settings icon in Siebel Mobile applications.

Table 1–2   (Cont.) New Product Features in Siebel Mobile Guide: Disconnected, Siebel Innovation Pack 2014

Topic	Description
"Configuring Notification Settings for Siebel Mobile" on page 8-16	New topic. Describes how to configure the preference settings for notification messages in Siebel Mobile applications.
"Enabling the Map Functionality for Siebel Mobile" on page 8-17	New topic. Before you can use the map functionality in Siebel Mobile applications, you must enable the map functionality first as described in this procedure.
"Scanning Barcodes from Siebel Mobile" on page 8-18	New topic. Describes how to scan barcodes from the Siebel Mobile application for Siebel Service.
"Integrating Siebel Mobile with Native Device Features" on page 8-21	New topic. Describes how to integrate Siebel Mobile with native device features.
"Siebel Mobile Application Logging" on page 8-31	New topic. Describes how to review log event messages and debug information for Siebel Mobile disconnected applications.
"Using the Home Page for Siebel Pharma" on page 9-1 "Viewing Call Planning Information" on page 9-2 "Scheduling Calls For Contacts and Accounts" on page 9-2	New topics. You can use the Siebel Pharma home page to schedule calls and view the call planning information for contacts and accounts.
"Adding Literature Information to a Call" on page 9-10	New topic. Describes how to add literature information to a call.
"Viewing Presentation Detail Information for a Call" on page 9-11	New topic. Describes how to view presentation detail information for a call.
"Modifying Attachment Information for an Account" on page 9-18	Revised topic. Describes how to associate attachments with individual account records, and how to view and update account attachments.
"Modifying Attachment Information for a Contact" on page 9-27	Revised topic. Describes how to associate attachments with individual contact records, and how to view and update contact attachments.
"Using the PCD Viewer in Siebel Mobile" on page 9-28	New topic. Describes how to use the PCD Viewer to deliver personalized content to customers, demonstrate information about products to customers, and obtain feedback from customers about product presentations.
"Printing Invoices Associated with an Activity" on page 10-14 "Printing Invoices Associated with a Service Request" on page 10-19 "Printing Invoices" on page 10-26	New topics. Printing invoices is supported in the Siebel Mobile application for Siebel Service.

2

Overview of Siebel Mobile Applications

This chapter introduces Oracle's Siebel Mobile applications. It contains the following topics:

- Siebel Mobile Products

- About Siebel Mobile

- Requirements for Using Siebel Mobile

- System Requirements for Siebel Mobile

- Setting Up Left-Hand Navigation

- MIT License

- Overview of Siebel Mobile Disconnected Application Synchronization

Siebel Mobile Products

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

- **Siebel Mobile Connected Applications.** Siebel Business Applications accessed from a browser on a mobile device, where the browser is connected to a Siebel Server. This is a new offering from Oracle which provides access to Siebel Business Applications, with its native look-and-feel, from tablets and smartphones.

- **Siebel Mobile Disconnected Applications.** Siebel applications accessed from a browser on a mobile device which synchronizes data directly to the browser client without use of additional software or a network connection. This is a new offering from Oracle which provides access to Siebel, with its native look-and-feel, from tablets and smartphones. The following applications are currently supported in disconnected mode: Siebel Pharma and Siebel Service.

- **Siebel Mobile Web Client and Siebel Remote.** A disconnected client and supporting data synchronized to the client without connection to the network. These applications provide intelligent transaction routing, data synchronization, and Store-and-Forward Messaging (SFM) capabilities. Siebel Remote works only on Microsoft® Windows™-based desktops, laptops, and tablets.

    Note: For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

> **Note:** Store-and-Forward Messaging is only supported for existing customers using SFM capabilities, and it is no longer available for new customers.

- **Siebel Handheld Applications.** A disconnected client with data filtering, data synchronization, and Store-and-Forward Messaging capabilities. Siebel Handheld applications only run on Microsoft Windows Mobile 6.5.x operating system.

- **Siebel Wireless.** Siebel Business Applications delivered to client browsers that connect to a Siebel Server through a wireless network. Siebel Wireless runs on any phone that has an HTML browser.

Figure 2–1 illustrates the hardware platforms on which these products run. In Figure 2–1, form factors refers to the general capabilities, screen shapes, and sizes of the various devices shown in the illustration.

Figure 2–1   Siebel Mobile Product Platforms
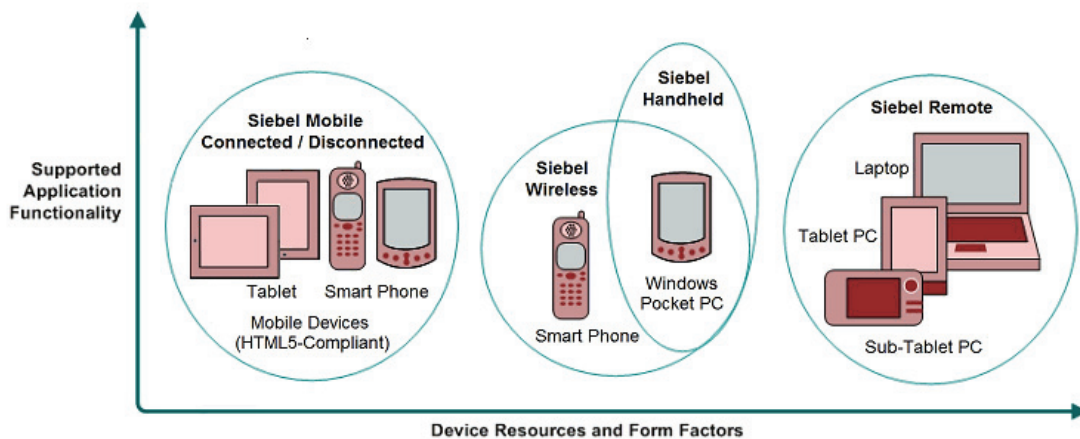
Table 2–1 describes the software components of Siebel Mobile, and the supported hardware devices.

Table 2–1   Siebel Mobile Product Software Components and Supported Devices

Product Group	Server Components	Client Component	Supported Client Devices
Siebel Mobile Connected	Siebel Mobile application in online mode (that is, connected to Siebel Server)	Client browser. For more information, see "Requirements for Using Siebel Mobile" on page 2-4.	Mobile devices with HTML5-compliant browsers. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.
Siebel Mobile Disconnected	Siebel Mobile application in offline mode (that is, disconnected from Siebel Server) Synchronization object manager	Client browser. For more information, see "Requirements for Using Siebel Mobile" on page 2-4.	Mobile devices with HTML 5-compliant browsers. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.

Table 2–1   (Cont.) Siebel Mobile Product Software Components and Supported Devices

Product Group	Server Components	Client Component	Supported Client Devices
Siebel Remote	Siebel Remote	Siebel Mobile Web Client	Desktop PCs
	Store-and-Forward Messaging	Note that Siebel Mobile Connected and Siebel Mobile Disconnected are not related to the Siebel Mobile Web Client in any way.	Laptops Tablets
Siebel Handheld Applications	Handheld Application Synchronization Object Manager Store-and-Forward Messaging	Siebel Handheld Client	Windows Mobile 6.5.x devices
Siebel Wireless	Wireless Object Manager	Client Browser	Any mobile device running a supported client browser, including wireless devices and handheld devices.

Table 2–2 describes the supported applications of Siebel Mobile, and documentation on the Siebel Bookshelf for information about these applications.

Table 2–2   Siebel Mobile Product Supported Applications and Related Documentation

Product Group	Supported Applications	Related Documentation
Siebel Mobile Connected	Siebel supports Responsive Web Design, so any Siebel desktop application will work from any device. For example, the following applications are supported: ■ Siebel Pharma ■ Siebel Consumer Goods ■ Siebel Sales ■ Siebel Service ■ Siebel Finance	If using Siebel Mobile in online mode only, then see the following: ■ *Siebel Mobile Guide: Connected* ■ *Configuring Siebel Open UI* ■ *Siebel Installation Guide* for the operating system you are using
Siebel Mobile Disconnected	Siebel Pharma Siebel Service	If using Siebel Mobile in both online and offline mode, then see the following: ■ *Siebel Mobile Guide: Disconnected* ■ *Configuring Siebel Open UI* ■ *Siebel Installation Guide* for the operating system you are using
Siebel Remote	Almost all Siebel Business Applications and Siebel Industry Applications (Provides the same look-and-feel as those applications)	*Siebel Remote and Replication Manager Administration Guide* *Siebel Store-and-Forward Messaging Guide for Mobile Web Client*
Siebel Handheld Applications	Siebel Pharma Siebel Consumer Goods Siebel Sales Siebel Service Siebel Medical	*Siebel Pharma Handheld Guide* *Siebel Consumer Goods Handheld Guide* *Siebel Sales Handheld Guide* *Siebel Service Handheld Guide* *Siebel Medical Handheld Guide* *Siebel Store-and-Forward Messaging Guide for Handheld*

Table 2–2   (Cont.) Siebel Mobile Product Supported Applications and Related

Product Group	Supported Applications	Related Documentation
Siebel Wireless	Siebel Sales	*Siebel Wireless Administration Guide*
	Siebel Service	
	Siebel Partner Relationship Management	
	Siebel Self-Service Applications	

About Siebel Mobile

Siebel Mobile applications enable you to access Siebel CRM information with your mobile device by permitting you to access a browser-based version of the following Siebel Business Applications on your mobile device:

- Siebel Pharma

- Siebel Service

The following applications are supported in connected and disconnected (offline) mode:

- Siebel Mobile application for Siebel Pharma

- Siebel Mobile application for Siebel Service

The following applications are supported in connected (online) mode only:

- Siebel Mobile application for Siebel Consumer Goods

- Siebel Mobile application for Siebel Sales

- Siebel Mobile application for Siebel Finance

For more information about Siebel Mobile connected applications, see Siebel Mobile Guide: Connected (this document). For more information about Siebel Mobile disconnected applications, see Siebel Mobile Guide: Disconnected.

The URL address that you use accesses a unique mobile-enabled and offline-enabled Siebel Application Object Manager and renders the UI using jQuery. jQuery is a JavaScript library or framework that is designed to simplify client-side scripting that employs JavaScript code. Siebel uses jQuery extensively in its client code. For more information about jQuery, go to the jQuery Website at http://jquery.com.

Siebel Mobile is ideal for field sales and service representatives whose access is limited to their tablet or smartphone device while travelling or in the field with a customer. Siebel Mobile applications are designed to maximize the following:

- **Usability.** Siebel Mobile is designed for field sales and service users and are optimized to support frequent tasks in the sales and service cycle.

- **Productivity.** Siebel Mobile maximizes productivity by enabling you to find the relevant information easily and to complete important activities quickly.

Requirements for Using Siebel Mobile

Siebel Mobile uses Siebel Open UI. Before you can use Siebel Mobile, you must meet the following requirements:

- You must have a mobile device with an internet connection.

- The browser on your mobile device must support the following: HTML5, CSS 3.0 or higher, and JavaScript 1.5 or higher.

- For Siebel Mobile applications in offline mode, you must have a minimum of 50 megabytes (MB) of available storage on your mobile device.

- You have reviewed the topics about Siebel Open UI and Siebel Mobile applications in the applicable *Siebel Installation Guide* for the operating system you are using.

System Requirements for Siebel Mobile

Siebel Mobile runs on HTML5-compliant browsers on many mobile devices, including the following:

- Apple® iOS devices (iPad®)

- Android OS devices (Samsung® Galaxy tablets and Galaxy smartphones)

Oracle does not certify any specific device as Siebel Mobile is standards based, and they support any device with a HTML5-compliant browser.

> **Note:** For Siebel CRM product releases 8.1.1.9 and later and for 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

MIT License

The print invoice capability inSiebel Mobile, which is available in the Siebel Mobile application for Siebel Service, is built using third-party open source embedded javascript (http://embeddedjs.com/) and uses MIT licensing.

```
================================================================================
The MIT License (MIT)
Copyright (c) <year> <copyright holders>
Permission is hereby granted, free of charge, to any person obtaining a copy of
this software and associated documentation files (the "Software"), to deal in the
Software without restriction, including without limitation the rights to use,
copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the
Software, and to permit persons to whom the Software is furnished to do so,
subject to the following conditions:
The above copyright notice and this permission notice shall be included in all
copies or substantial portions of the Software.
THE SOFTWARE IS PROVIDED "AS IS", WITHOUT WARRANTY OF ANY KIND, EXPRESS OR
IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS
FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT. IN NO EVENT SHALL THE AUTHORS OR
COPYRIGHT HOLDERS BE LIABLE FOR ANY CLAIM, DAMAGES OR OTHER LIABILITY, WHETHER IN
AN ACTION OF CONTRACT, TORT OR OTHERWISE, ARISING FROM, OUT OF OR IN CONNECTION
WITH THE SOFTWARE OR THE USE OR OTHER DEALINGS IN THE SOFTWARE.
================================================================================
```

For more information about printing invoices, see the following topics:

- "Printing Invoices Associated with an Activity" on page 10-14

- "Printing Invoices Associated with a Service Request" on page 10-19

- "Printing Invoices" on page 10-26

Setting Up Left-Hand Navigation

The procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation for applications that use Siebel Open UI. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals for Siebel Open UI*.

Overview of Siebel Mobile Disconnected Application Synchronization

The Siebel Synchronization Server component, which runs on the Siebel application server can accept concurrent synchronization requests from multiple synchronization clients.

Figure 2–2 illustrates the Siebel Mobile disconnected application synchronization infrastructure as follows:

- The Siebel Synchronization Engine and the Common Application and Data Services reside on the Siebel Server.

- The Siebel Database, Siebel Repository, and Siebel Tools communicate with the Siebel Application Server.

Figure 2–2   Siebel Mobile Disconnected Application Synchronization Infrastructure

3
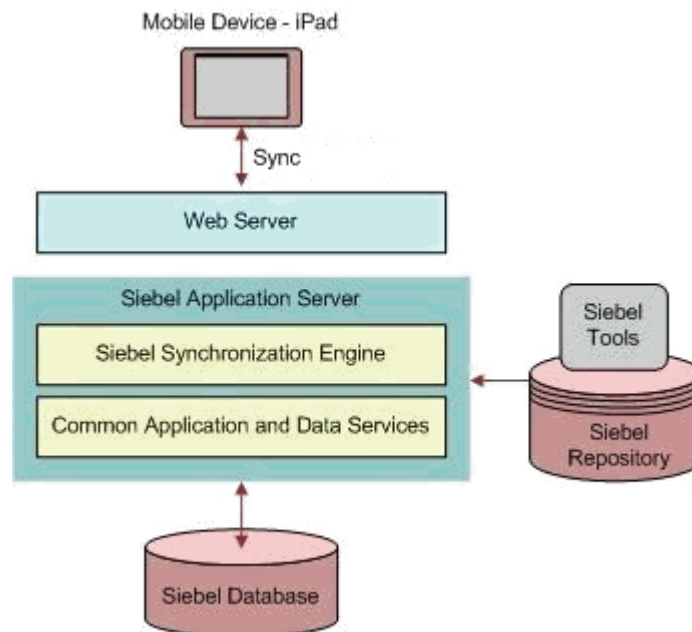
Setting Up Siebel Mobile Disconnected Applications

This chapter describes how to set up Siebel Mobile disconnected applications. It includes the following topics:

- Roadmap for Setting Up Siebel Mobile Disconnected Applications

- Requirements for Setting Up Siebel Mobile Disconnected Applications

- Adding Object Managers for Siebel Mobile Disconnected Applications

- Adding Virtual Directories for Siebel Mobile Disconnected Applications

- Siebel Application Object Manager Parameters for Siebel Mobile Disconnected Applications

- Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications

- Guidelines for Developing Data Filters for Siebel Mobile Disconnected Applications

- Customizing Siebel Mobile Disconnected Applications

- Copying and Deleting Siebel Mobile Applications

- Troubleshooting Your Siebel Mobile Disconnected Application

Roadmap for Setting Up Siebel Mobile Disconnected Applications

To set up Siebel Mobile disconnected applications, review and perform the following tasks:

1. Review "Load Balancing Support for Synchronization" on page 4-12 before setting up Siebel Mobile disconnected applications.

2. Review "Requirements for Setting Up Siebel Mobile Disconnected Applications" on page 3-2

3. "Adding Object Managers for Siebel Mobile Disconnected Applications" on page 3-3

4. "Adding Virtual Directories for Siebel Mobile Disconnected Applications" on page 3-4

5. "Siebel Application Object Manager Parameters for Siebel Mobile Disconnected Applications" on page 3-6

6. "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7

7. "Setting Up Users for Siebel Mobile Disconnected Applications" on page 4-1

8. Set up the business component data filters for Siebel Mobile applications.

   For more information, review "Guidelines for Developing Data Filters for Siebel Mobile Disconnected Applications" on page 3-19 and see Chapter 5, "Data Filtering for Siebel Mobile Disconnected Applications".

9. Set up the default fields for non-UI business component fields.

   The Handheld Business Service only downloads fields that are exposed in the UI.To download the non-UI fields, you must configure the field details. For more information, see "Configuring Application Settings for Siebel Mobile Disconnected Applications" on page 4-5.

10. Set up the default Business Objects to extract the business objects and the business components which are not extracted as part of UI.

    The Handheld Business Service only downloads business components that are exposed in the UI. To download any additional non-UI fields, you must configure the default business objects in the Administration - Siebel Mobile, Application Administration, Settings view. For more information, see "Configuring Application Settings for Siebel Mobile Disconnected Applications" on page 4-5.

11. "Monitoring Synchronization Sessions for Siebel Mobile Disconnected Applications" on page 4-18

12. "Customizing Siebel Mobile Disconnected Applications" on page 3-20

Requirements for Setting Up Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1. Before starting to set up your Siebel Mobile application, you must meet the following requirements.

1. The installed software for Siebel Mobile is Siebel Innovation Pack 2014.

   Install Siebel Innovation Pack 2014 for new installations or for existing installations. For more information about new installations and patch installations, see *Siebel Installation Guide for the operating system you are using*.

2. If it is required, run the Siebel Incremental Repository Merge to update your database to the latest Siebel CRM version 8.1.1.14 or version 8.2.2.14.

   Running IRM is necessary only after installing Siebel Innovation Pack 2014 as a patch installation for an existing 8.1.1.x/8.2.2.x installation. For more information about setting up and using Siebel Incremental Repository Merge, see *Siebel Database Upgrade Guide*.

   For new installations, running Siebel Incremental Repository Merge is not required. Install a new Siebel database for Siebel CRM version 8.1.1.14 or version 8.2.2.14.

3. All standard Siebel Server and Siebel Web Server Extension (SWSE) configurations have been carried out before you run any Siebel Mobile scripts on the Siebel Server and SWSE.

   - **New installations.** Run the standard Siebel Server and SWSE Configuration Wizard tasks to create the object managers and virtual directories for the language or languages that you choose to deploy.

   - **Migration installations.** Run the scripts to add the object managers and virtual directories for new Siebel Mobile applications not present in any prior

installation, for the existing installed and deployed languages. For Siebel Application Object Managers, run the object manager script for each language that you are deploying. For SWSE, run the virtual directory script once and specify all languages.

■ **Additional languages.** After a migration installation, run the object manager script once for each installed language. If adding a new language to an existing installation of Siebel Innovation Pack 2014, then run the object manager and virtual directory scripts for that language, but only after completing all the standard tasks to install and deploy a new language first as detailed in *Siebel Installation Guide for the operating system you are using*.

For more information, see the following procedures:

■ "Adding Object Managers for Siebel Mobile Disconnected Applications" on page 3-3

■ "Adding Virtual Directories for Siebel Mobile Disconnected Applications" on page 3-4

> **Note:** The Siebel Bookshelf is available on Oracle Technology Network http://www.oracle.com/technetwork/indexes/documentation/index.html and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Adding Object Managers for Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1 and is required under the following conditions:

■ **For new installations.** The Siebel Application Object Managers are created by default in the language or languages selected during Siebel CRM installation. For example, if ENU and ESP are the languages selected, then the Siebel Application Object Managers shown in Table 3–1 are automatically added for ENU and ESP so it is not necessary to add them again. If you want to run your Siebel Mobile application subsequently in a new language, then you must run the new_compdef_sia script for each language that must be supported, but only after first completing all the standard tasks to install and deploy a new language.

■ **For migration installations.** You must run the new_compdef_sia script to add the object managers for new Siebel Mobile applications not present in any prior installation, for each language that is installed and deployed on the Siebel Server.

■ **For additional languages.** You must run the new_compdef_sia script after adding a new language on the Siebel Server, but only after first completing all the standard tasks to install and deploy a new language.

> **Note:** For more information about new installations, migration installations, and additional language installations, including the standard tasks to install and deploy a new language, see *Siebel Installation Guide for the operating system you are using*.

Table 3–1   Siebel Application Object Managers for Siebel Mobile Applications

Application	Application Object Manager
Siebel Mobile application for Siebel Pharma	ePharmamObjMgr_enu
	ePharmamObjMgr_esp
Siebel Mobile application for Siebel Service	ServicemObjMgr_enu
	ServicemObjMgr_esp

The following procedure shows you how to run the new_compdef_sia script to add new object managers for Siebel Mobile applications. Running the script adds the object managers for Siebel Mobile applications that are in the HandheldSync and HandheldSyncSIS component groups.

To add object managers for Siebel Mobile applications

1. Stop the Siebel Server.

2. Stop the Siebel Gateway Name Server and make a backup of the siebns.dat file.

3. Restart the Siebel Gateway Name Server.

4. Set the SIEBEL_HOME environment variable to the *SES_HOME*/siebsrvr directory.

5. Navigate to the following folder from, for example, a command prompt:

   SES_HOME/siebsrvr/bin/<LANG>

6. Execute one of the commands shown in the following table, as required:

Operating System	Command
Microsoft Windows	Execute the following command on Windows:
	new_compdef_sia.bat *<GATEWAY>*:*<PORT>* *<ENTERPRISE>* *<USERNAME>* *<PASSWORD>* *<LANG>*
Linux or UNIX	Execute the following command on Linux or UNIX:
	new_compdef_sia.ksh *<GATEWAY>*:*<PORT>* *<ENTERPRISE>* *<USERNAME>* *<PASSWORD>* *<LANG>*

7. When prompted, verify that the parameters passed are correct.

8. Start the Siebel Server.

9. Enable the component groups for Siebel Mobile.

   For more information, see "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

Related Topic

"Siebel Application Object Manager Parameters for Siebel Mobile Disconnected Applications" on page 3-6

Adding Virtual Directories for Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1 and is required under the following conditions:

- **For new installations.** The virtual directories are created by default in the language or languages selected during Siebel CRM installation. For example, if

ENU and ESP are selected, then virtual directories are automatically added for ENU and ESP so it is not necessary to add them again. If you want to run your Siebel Mobile application subsequently in a new language, then you must run the new_virdirs script for each language that must be supported, but only after first completing all the standard tasks to install and deploy a new language.

- **For migration installations.** You must run the new_virdirs script to add the virtual directories for new Siebel Mobile applications not present in any prior installation, for the existing installed and deployed languages. For Siebel Web Server Extension (SWSE), run the script once and specify all languages.

- **For additional languages.** You must run the new_virdirs script after adding a new language on the Siebel Server, but only after first completing all the standard tasks to install and deploy a new language.

The following procedure shows you how to run the new_virdirs script to add virtual directories for Siebel Mobile applications. You create virtual directories on a particular Web server where SWSE is installed. You must create the virtual directories on every Web server that supports Siebel Mobile applications.

> **Note:** For more information about new installations, migration installations, and additional language installations, including the standard tasks to install and deploy a new language and how to create custom virtual directories, see *Siebel Installation Guide for the operating system you are using*.

To add virtual directories for Siebel Mobile applications using the new_virdirs script

1. Stop the Web server.

   For more information about starting and stopping the Web server, see *Siebel Installation Guide for the operating system you are using*.

2. Create a backup copy of each of the following files:

   - eapps.cfg

   - eapps_sia.cfg

   - Web server configuration files. For example, obj.conf, httpd.conf, and so on.

3. From the `EAPPWEB_HOME/config` directory, execute the new_virdirs.sh or new_virdirs.bat script with the appropriate parameters shown in the following table.

Operating System	Parameters
Microsoft Windows	The following parameter is required on Windows:
	`eappweb\config\new_virdirs.bat <LANGUAGES>`
	where:
	■ *LANGUAGES* is a list of language codes, where a comma separates each code.Siebel Mobile Guide: Connected

Operating System	Parameters
Linux or UNIX	The script on UNIX operating systems accepts both *<LANGUAGES>* and *<WEBSERVER_LOCATION>*: `./new_virdirs.sh <LANGUAGES> <WEBSERVER_LOCATION>` where: ■ *LANGUAGES* is a list of language codes, where a comma separates each code. ■ *WEBSERVER_LOCATION* identifies the folder where the Web server resides.

> **Note:** If execution of the new_virdirs.sh or new_virdirs.bat script fails, then you must restore all necessary files from the backup in Step 2.

4. Restart the Web server.

Access the new components using the URL. For more information about the Siebel Mobile application URLs, see "Logging In to Siebel Mobile Applications" on page 8-2.

Siebel Application Object Manager Parameters for Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1.

Siebel Application Object Manager parameters must be set on every Siebel Server that will support Siebel Mobile, and for each language that must support Siebel Mobile disconnected applications. For more information about Siebel Application Object Manager parameters and the Siebel Server Manager, see *Siebel System Administration Guide*. For more information about enabling Siebel Open UI for Siebel Application Object Managers, see *Siebel Installation Guide* for the operating system you are using.

The Siebel Application Object Manager parameters settings shown in Table 3–2 are required for all by Siebel Mobile applications. It is not necessary to set the object manager parameters shown in Table 3–2, except for EnableOfflineMode, because they are already set by default.

For Siebel Mobile disconnected, you must set the EnableOfflineMode application object manager parameter to TRUE to enable offline mode for the following applications:

■ Siebel Mobile application for Siebel Pharma

■ Siebel Mobile application for Siebel Service

EnableOfflineMode is set to FALSE by default. Before you can work in offline mode, you must enable offline mode. The following procedure shows you how to set the EnableOfflineMode application object manager parameter.

To set the EnableOfflineMode application object manager parameter

1. Log in to the srvrmgr.

2. Type the following command at the srvrmgr command line for each Siebel Mobile application in the appropriate language.

For U.S. English for example, type the command as follows:

```
change param EnableOfflineMode=True for comp XObjMgr_enu
```

For each language that you want to set up for your Siebel Mobile application, substitute the language in question for _enu and replace *XObjmgr* with the name of the application object manager (as shown in Table 3–2). For example, use _esp to enter the command for the Spanish language on ePharmamObjMgr as follows:

```
change param EnableOfflineMode=TRUE for comp ePharmamObjMgr_esp
```

Table 3–2   Siebel Application Object Manager Parameters for Siebel Mobile Applications

Parameter Name	Parameter Setting
AppletSelectStyle	`AppletSelectStyle="Applet Select"`
EnableInlineForList	`EnableInlineForList=Never`
EnableOfflineMode	`EnableOfflineMode=True`
EnableOpenUI	`EnableOpenUI=TRUE`
EnableSIFocusTracking	`EnableSIFocusTracking=TRUE`
HighInteractivity	`HighInteractivity=TRUE`
ShowWriteRecord	`ShowWriteRecord=TRUE`

Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications

This process is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1. To configure Siebel Server for Siebel Mobile disconnected applications, perform the following tasks:

- "Enabling the Handheld Component Groups for Siebel Mobile Disconnected Applications" on page 3-8

- "Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8

- "Assigning Responsibilities to Siebel Mobile Disconnected Application Users" on page 3-11

- "Setting Up Selective Retrieval for Siebel Mobile Disconnected Application Views" on page 3-14

- "Configuring Object Definitions for Siebel Mobile Disconnected Applications" on page 3-14

- "Configuring Siebel Mobile Disconnected Application Settings" on page 3-14

- "Configuring the Mobile Node for Siebel Mobile Disconnected Application Users" on page 3-15

- "Running Database Extract for Siebel Mobile Disconnected Application Users" on page 3-16

- "Configuring the Web Server for Siebel Mobile Disconnected Applications" on page 3-17

- "Configuring a Hybrid Server Setup" on page 3-18

- "Guidelines for Developing Data Filters for Siebel Mobile Disconnected Applications" on page 3-19

Enabling the Handheld Component Groups for Siebel Mobile Disconnected Applications

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7 and "Guidelines for Developing Data Filters for Siebel Mobile Disconnected Applications" on page 3-19.

The handheld components for Siebel Mobile must be enabled on the supported Siebel Server. You can enable the handheld component groups for the following Siebel Mobile applications on Microsoft Windows or on UNIX:

- ePharma Mobile Object Manager (<Lang>)
- Service Mobile Object Manager (<Lang>)

To enable the handheld component groups for Siebel Mobile disconnected applications

1. Log in to the Siebel Web application, and then do the following:

   a. Navigate to the Administration - Server Configuration screen, then the Component Groups view.

   b. Query for the HandheldSync* component group.

      The following handheld component groups are returned:

      – HandheldSync

      – HandheldSyncSIS

   c. For each of these component groups, do the following:

      – Select the component group, and then click the Enable button.

      – In the Component Group Assignments applet, click the Enable button for the required Windows or UNIX Server.

   d. If required, go to the LifeSciences component group, and enable it as described in Step 1c.

      NOTE: The LifeSciences component group must only be enabled if using the Siebel Pharma application.
      ---

2. Stop, and then restart the Siebel Server.

Setting Up the Disconnected Mobile Synchronization Component Group

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

The following procedure shows you how to set up the Disconnected Mobile Synchronization component group (MobileSync) for Siebel Mobile disconnected applications. The purpose of this task is to support synchronization in disconnected mode.

The Disconnected Mobile Synchronization component group (MobileSync), the Data Extraction component (MobileDbXtract), and batch synchronization are all configured for the Siebel Mobile application for Siebel Pharma by default so it is not necessary to configure them again for the application.

You must use MobileDbXtract as a template and configure it accordingly to create the Data Extraction component for other mobile applications (such as, the Siebel Mobile application for Siebel Service), as shown in the following procedure.

To set up the Disconnected Mobile Synchronization component group for Siebel Mobile applications

1. Connect to the server manager on your server computer and run the following command to see if the MobileSync component group has been enabled or not:

   ```
   list compgrps
   ```

   If required, enable the MobileSync component group as follows:

   a. Navigate to the Administration - Server Configuration screen, then the Enterprises view.

   b. Select the Component Groups tab, and then query for MobileSync in the Alias field.

   c. Click the Enable button.

   d. In the Component Groups Assignments applet, click the Enable button for the required Windows or UNIX server.

2. Create the Data Extraction component for the mobile application as follows:

   a. Log in to the Siebel application as a user with administrator privileges.

   b. Navigate to the Administration - Server Configuration screen, then the Enterprises view.

   c. Click the Component Definitions tab, and then query for MobileDbXtract in the Alias field.

   d. Using MobileDbXtract as a template, create a similar Data Extraction component for the mobile application you want to set up the Disconnected Mobile Synchronization component group (MobileSync) for as follows:

   – Click Menu, then Copy Record.

   – In the Component field, type the name of the new Data Extraction component. For example, type in ServicemDbXtract to create a Data Extraction component for the Siebel Mobile application for Siebel Service.

   – Select MobileSync from the Component Group drop-down list.

   – In the Description field, type a description of the new component.

   e. In the Component Parameters applet, configure the component parameters for the Data Extraction component (ServicemDbXtract) with the values shown in the following table:

Name	Value
Application Name	Siebel Service for Mobile
	Note that the application name must be exactly the same as the mobile application name. You can find the mobile application name using the srvrmgr command line as follows: `list param CFGApplication Name for comp ServicemObjMgr_enu.`
Language Code	ENU
Application Repository File	siebel_sia.srf

f. Click the Activate button to activate the Data Extraction component (created in Step 2d.) for the mobile application.

g. Click the Synchronize button to synchronize the Data Extraction component (created in Step 2d.) for the mobile application.

Note: This synchronization is a server administration task, which must be done for batch mode server components after certain types of operations, and is not related to the data synchronization that the components perform. For more information, see *Siebel System Administration Guide*.

---

3. Configure the settings for the mobile application as follows:

a. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

b. Select the mobile application from the top applet. For example: Siebel Service for Mobile.

c. Click the Settings tab, and then do the following:

- Click New, select Data Extraction Component in the Name field, and then select the actual data extraction component (for example: ServicemDbXtract) in the Value field. The name of the data extraction component must be the same as the name defined in Step 2.

- Click New, select Enable Batch Extraction in the Name field, and then select True in the Value field. For more information, see "Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16.

- Set any other mobile application settings. For example, set PurgeInterval, Default Busobj, and ApplicationDirectory. For more information, see Configuring Siebel Mobile Disconnected Application Settings.

d. Restart the Siebel Server for the changes to take effect.

e. Check the status of the MobileSync component group by doing one of the following:

- From the command line, run the following command:

```
list comp for compgrp MobileSync
```

- From the UI, navigate to the Administration - Server Management screen, then the Components view.

4. Create a mobile client (for example: SPORTER) and perform the database extraction by doing one of the following:

- From the command line, run the Database Extract component (DbXtract) using the following command:

```
start task for comp dbxtract with client="SPORTER-MOBILE"
```

- From the UI, navigate to the Administration - Server Management screen, then the Jobs view, and select the Database Extract component (DbXtract). In the Job Parameters applet, add a Client Name parameter and its value, for example, as follows:

```
ClientName=SPORTER-MOBILE
```

5. Start the mobile application (for example, servicem_enu) and log in with the appropriate user credentials.

6. Test that batch synchronization is working:

   ■ Run the following in the server manager:

   ```
   list task for comp MobileDbXtract
   ```

   From the UI, you can check the status of MobileDbXtract or the component of the respective application that was created (for example, ServiceDbXtract) by navigating to the Administration - Server Management screen, then the Tasks view.

   ■ Verify that the dmData.txt file is generated in hhsync/<mobile-application> directory. For example:

   hhsync/phm is the directory created for the Siebel Mobile application for Siebel Pharma. hhsync/servicem is the directory created for the Siebel Mobile application for Siebel Service.

   The folder structure is determined by the ApplicationDirectory value specified in the Administration - Siebel Mobile screen, Application Administration, Settings view.

Assigning Responsibilities to Siebel Mobile Disconnected Application Users

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

A responsibility corresponds to a set of views. Responsibilities control the views to which users have access. The following procedure shows you how to assign views to a responsibility and then users to that responsibility. For more information about setting up view access and users for Siebel Mobile, see "Setting Up Selective Retrieval for Siebel Mobile Disconnected Application Views" on page 3-14 and "Setting Up Users for Siebel Mobile Disconnected Applications" on page 4-1.

To assign responsibilities to Siebel Mobile disconnected application users

1. Log in to the Siebel application as a user with administrator privileges.

2. Navigate to the Administration - Application screen, then the Responsibilities view.

3. Query for and select the appropriate responsibility or user role.

   For example, query for the following: PH Pharma Sales Rep - US Sales.

4. Select the Responsibilities tab, and then do the following:

   a. In the lower Users applet, add users to the responsibility as required.

   b. In the lower Views applet, add the appropriate views to the responsibility as required.

Table 3–3 lists the Siebel Mobile application views that are added by default as part of the seed data for Siebel Mobile, so it is not necessary to manually add the views again.

Table 3–3 Siebel Mobile Application Views

Application	Default Views
Siebel Mobile application for Siebel Pharma	LS Home Page Call View - Mobile
	LS Pharma Call Validation Results View - Mobile
	LS Pharma Call Signature Capture View - Mobile
	LS Pharma Signature Audit Administration View_PUI
	SIS HH Pharma Account Call Attendee View - Mobile
	SIS HH Pharma Professional Promotional Items View - Mobile
	SIS HH Pharma Professional Samples Dropped View - Mobile
	SIS HH Pharma Professional Call Products Detailed View - Mobile
	eDetailer Message Plan Preview View - Mobile
	eDetailer Presentation View - Mobile
	Pharma Call Literature View - Mobile
	Pharma Account List View - Mobile
	Pharma Account Contact View - Mobile
	Pharma Account Calls View - Mobile
	Pharma Account Addresses View - Mobile
	Pharma Account Affiliations View - Mobile
	Pharma Account Relationships View - Mobile
	Pharma Account Attachments View - Mobile
	Pharma Contact List View - Mobile
	Pharma Contact Call View - Mobile
	Pharma Contact Address View - Mobile
	Pharma Contact Best Contact Times View - Mobile
	Pharma Contact State Licenses View - Mobile
	Pharma Contact Affiliations View - Mobile
	Pharma Contact Relationships View - Mobile
	Pharma Contact Attachments View - Mobile

Table 3–3   (Cont.) Siebel Mobile Application Views

Application	Default Views
Siebel Mobile application for Siebel Service	SHCE Service Account Assets View - Mobile
	SHCE Service Account Contacts View - Mobile
	SHCE Service Account Entitlements View - Mobile
	SHCE Service Account SRs View - Mobile
	SHCE Service Accounts View - Mobile
	SHCE Service Activity Assets List View - Mobile
	SHCE Service Activity Attachment View - Mobile
	SHCE Service Activity Contact Form View - Mobile
	SHCE Service Activity FS Expense View - Mobile
	SHCE Service Activity FS Instructions List view - Mobile
	SHCE Service Activity FS Steps View - Mobile
	SHCE Service Activity Home Page View - Mobile
	SHCE Service Activity Invoice Signature View - Mobile
	SHCE Service Activity SR List View - Mobile
	SHCE Service Activity Time View - Mobile
	SHCE Service Asset Entitlements View - Mobile
	SHCE Service Asset List View - Mobile
	SHCE Service Asset Measurement View - Mobile
	SHCE Service Asset Reading View - Mobile
	SHCE Service Asset Warranty View - Mobile
	SHCE Service FS Activity Part Movements View - Mobile
	SHCE Service FS Activity Recommended Parts Tools - Mobile
	SHCE Service FS Invoice - Auto Invoice View - Mobile
	SHCE Service Invoice Line Item Details View - Mobile
	SHCE Service Invoice List View - Mobile
	SHCE Service Invoice line Item View - Mobile
	SHCE Service My Part Browser View - Mobile
	SHCE Service Order line Item View - Mobile
	SHCE Service Orders List View - Mobile
	SHCE Service Part Browser Availability View - Mobile
	SHCE Service Part Browser Substitute View - Mobile
	SHCE Service SR Activity View - Mobile
	SHCE Service SR Invoices View - Mobile
	SHCE Service SR Orders View - Mobile
	SHCE Service Service Request Invoice Signature View - Mobile
	SHCE Service Service Request View - Mobile
	SHCE Technician Breaks View - Mobile
	SHCE Technician POU View - Mobile
	SHCE Technician Shifts View - Mobile

Setting Up Selective Retrieval for Siebel Mobile Disconnected Application Views

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

All Siebel Mobile application views are available to users in offline mode by default. Setting up selective retrieval for Siebel Mobile application views is therefore a mandatory step if you want to restrict the number of views that will be downloaded to client devices and available to users in offline mode. For more information about setting up selective retrieval for Siebel Mobile application views, see the following topics:

- "Configuring Access to Views for Siebel Mobile Disconnected Applications" on page 4-2

- "Limiting Access to Views by Modifying Responsibilities" on page 4-3

- "Limiting Access to Views for All Responsibilities Globally" on page 4-4

Configuring Object Definitions for Siebel Mobile Disconnected Applications

It is not necessary to configure object definition data for the following Siebel Mobile applications because the object definitions are configured by default:

- Siebel Mobile application for Siebel Pharma

- Siebel Mobile application for Siebel Service

However, for information about configuring object mappings for a new or customized business component, see "Configuring the Object Mappings for a New Business Component" on page 6-7.

Configuring Siebel Mobile Disconnected Application Settings

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

Siebel Mobile application settings are configured in the Settings view. The following application settings must be configured for all Siebel Mobile applications:

- **Purge Interval,** which is set to 30 by default.

    This field specifies the duration of the Purge Interval for cleaning up the S_SD_CHG_TXN and S_DM_CHG_TXNPAR tables. These tables carry incremental data, and the volume of data continues to grow in these tables if a user fails to download data for a long time. If a user fails to download data during the Purge Interval, then all incremental data is purged by default.

    > **Note:** When the purge interval expires, the transaction router (TxnRouter) will not track the incremental changes for that node any more and a forced full download will be triggered the next time that the user goes offline (switches to disconnected mode).

- **Default Busobj,** which is used to download the business objects that are not based on any view in the Siebel Mobile application.

- **ApplicationDirectory,** which is used to specify the directory where user metadata is saved. For example: hhsync\phm (on Windows) or hhsync/phm (on UNIX). Forward slash must be used for UNIX.

- **Data Extraction Component,** which must be created for Siebel Mobile applications, such as, the Siebel Mobile application for Siebel Service.

  > **Note:** The Data Extraction Component (MobileDbXtract) is configured by default for the Siebel Mobile application for Siebel Pharma so it is not necessary to configure it again for the application.

- **Enable Batch Extraction,** which is used to configure batch synchronization for Siebel Mobile applications.

Use the following procedure to configure Siebel Mobile application settings. This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7 and "Guidelines for Developing Data Filters for Siebel Mobile Disconnected Applications" on page 3-19.

To configure Siebel Mobile disconnected application settings

1. Navigate to the Administration - Siebel Mobile screen, Application Administration, and then the Settings view.

2. Verify that Purge Interval is set to 30.

3. Set ApplicationDirectory, Default Busobj, and other application settings as required.

   For information about all the other application settings that can be configured for Siebel Mobile applications, see the following topics:

   - "Configuring Application Settings for Siebel Mobile Disconnected Applications" on page 4-5

   - "Application Settings for Siebel Mobile Disconnected Applications" on page 4-9

   - "Configuring the ApplicationDirectory Setting" on page 4-7

Configuring the Mobile Node for Siebel Mobile Disconnected Application Users

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

The following steps must be performed for each Siebel Mobile application user. Setting up the mobile node triggers transaction logging for the corresponding user on the Siebel Server.

To configure the mobile node for a Siebel Mobile disconnected application user

1. Log in to the Siebel application as a user with administrator privileges.

2. Navigate to the Administration - Siebel Mobile screen, then the Mobile Clients view.

3. In the Mobile Clients applet, click new to create a new record with the following values:

   - **User ID.** Click the lookup icon, and then select a user ID from the picklist that opens.

   - **Mobile Application.** Click the lookup icon, and then select the appropriate mobile application name from the picklist that opens.

- **Mobile Client.** After you complete the Mobile Application field, the Mobile Client field automatically shows the following: `<username>-MOBILE`.

- **Routing Model.** Click the lookup icon, and then select Mobile Client - Standard from the picklist that opens.

4. Connect to the server manager and run Database Extract (dbxtract) for each application user. For more information, see "Running Database Extract for Siebel Mobile Disconnected Application Users" on page 3-16.

For more information about setting up users in Siebel Mobile applications, see "Setting Up Users for Siebel Mobile Disconnected Applications" on page 4-1.

Running Database Extract for Siebel Mobile Disconnected Application Users

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

You must run the Database Extract component (dbxtract) for every Siebel Mobile application user. Running dbxtract for each user takes approximately 3-10 minutes.

> **Note:** If the position changes for a Siebel Mobile application user (for example, the data visibility for the user increases or decreases), then you must run the Database Extract component again for that user. After dbxtract is run again, a full data and metadata download is enforced on the disconnected client by Siebel Mobile when the mobile client next sends a synchronization request to the Siebel Server.

To run dbxtract for Siebel Mobile disconnected application users from srvrmgr command line

1. Start a task for the Database Extract component with the following parameters:

```
client="<client-name>"
```

For example, for SPORTER-MOBILE, run dbxtract as follows:

```
start task for comp dbxtract with client="SPORTER-MOBILE"
```

2. Run the same command for each configured Siebel Mobile application user.

You can also run dbxtract against a list of users that are specified in a command list or in a file, for example, as follows:

```
start task for comp dbxtract with
client="SPORTER-MOBILE,LHILL-MOBILE,BFRIEDEL-MOBILE"
```

You can check the dbxtract log file to see the status (completed or failed) for each user specified in the command.

3. If the transaction processor component is not running, then run the following command:

```
start task for comp txnproc
```

4. To change the interval for the component, run the following command:

```
change param sleeptime=<value> for comp txnproc
```

For more information about setting up users for Siebel Mobile applications, see "Setting Up Users for Siebel Mobile Disconnected Applications" on page 4-1 and

"Roadmap for Configuring Incremental Synchronization for Siebel Mobile" on page 6-6.

Configuring the Web Server for Siebel Mobile Disconnected Applications

This task is a step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

The following procedures show you how to set MIME Type on different Web servers for Siebel Mobile applications. The procedure is similar across all Web servers. For more information, see the supporting Web server documentation.

To configure MIME Type on Microsoft Windows with IIS, for example, see "Configuring MIME Type on Microsoft Windows" on page 3-17. To configure MIME type on operating systems other than Microsoft Windows, see the following:

- "Configuring MIME Type for Linux" on page 3-17
- "Configuring MIME Type for AIX and HPUX" on page 3-18
- "Configuring MIME Type for Solaris" on page 3-18

> **Note:** For a complete list of supported Web servers for each operating system, go to the Certifications tab on My Oracle Support and see *Siebel Installation Guide* for the operating system you are using.

Configuring MIME Type on Microsoft Windows

Use the following procedure to configure MIME Type for Microsoft Windows with Internet Information Services (IIS).

To configure MIME Type on Microsoft Windows

1. Start IIS.

   On Microsoft Windows for example, click Start, Control Panel, Administrative Tools, and then Internet Information Services.

2. Right click your local computer in the left pane, and then Properties.

3. Click the MIME Types button, and then New.

4. Configure MIME Type as follows:

   a. In the Extension field, enter the file name extension, as follows:

      ```
      .manifest
      ```

   b. In the MIME Type field, enter a description that exactly matches the file type defined on the computer, as follows:

      ```
      text/cache-manifest
      ```

5. Click OK.

Configuring MIME Type for Linux

Use the following procedure to configure MIME type for Oracle Enterprise Linux (Linux) with Oracle HTTP Server (for example, 11g Web Server).

To configure MIME type for Linux

1. Login into the Linux computer.

2. Navigate to Web server installation directory where the mime.types file is located. For example:

```
cd <WEB_SERVER_INST_DIR>/ config/OHS/ohs1
```

3. Run the following command:

```
echo "text/cache-manifest manifest appcache" >> mime.types
```

4. Restart the Web server.

Configuring MIME Type for AIX and HPUX

Use the following procedure to configure MIME type for AIX and HPUX with HTTP Server and Apache Web Server. The types of HTTP Servers are as follows:

- IBM HTTP Server (on AIX)

- Oracle HTTP Server (on Linux)

To configure MIME type for AIX and HPUX

1. Login into the AIX or HPUX computer.

2. Navigate to the Web server installation directory where the mime.types file is located. For example:

```
cd <WEB_SERVER_ROOT>/conf
```

3. Run the following command:

```
echo "text/cache-manifest manifest appcache" >> mime.types
```

4. Restart the Web server.

Configuring MIME Type for Solaris

Use the following procedure to configure MIME Type for Solaris with Oracle iPlanet Web Server.

To configure MIME Type for Solaris

1. Login into the Solaris computer.

2. Navigate to Web server installation directory where the mime.types file is located.

    For example:

```
cd <WEB_SERVER_ROOT>/https-localhost/config
```

3. Run the following command:

```
echo "type=text/cache-manifest exts=appcache,manifest" >> mime.types
```

4. Restart the Web server.

Configuring a Hybrid Server Setup

This task is step in "Process of Configuring Siebel Server for Siebel Mobile Disconnected Applications" on page 3-7.

For Siebel Innovation Pack 2014 and later, you can set up the MobileSync component group and also Siebel Mobile disconnected applications on Microsoft Windows or any UNIX platform. The MobileSync component group includes the MobileDbXtract component which is a new component, and the following legacy remote components,

which were formerly part of the Siebel Remote component group: TxnRoute, TxnProc, and DbXtract.

Use the following procedure to configure a hybrid server setup for Siebel Mobile. Configuring a hybrid server setup is optional.

> **Note:** The complete system requirements and supported platform certifications are available from the Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

To configure a hybrid server setup for Siebel Mobile

1. Navigate to the Administration - Server Configuration screen, Enterprises, and then the Component Definition view.

2. Query for one of the following, as required:

   ePharma Mobile Object Manager (<Lang>)

   Service Mobile Object Manager (<Lang>)

3. Click Component Parameters, and then click Advanced.

4. Search for Siebel File System, and then update the value to the respective windows path.

Guidelines for Developing Data Filters for Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1.

Siebel Mobile applications use the existing Siebel Handheld Application framework for data filtering. Because Siebel Mobile applications run on a browser on a mobile device and typically on a slower network, careful analysis is required to limit the amount of data that is downloaded to client devices. Before starting to design and develop filters for Siebel Mobile applications, it is recommended that you consider the following guidelines:

- Examine all of your Siebel application configuration and make a note of all the business objects and business components.

- For each business object and business component, determine if there is a search specification that can be specified for daily usage, which will cut down on user data size. There is a browser storage limit of 50 MB, data filter configuration is required to limit the number of records that are downloaded to mobile devices.

- Because picklists tend to carry a lot of data, especially if there is no search specification defined for the picklist, review the buscomps used in picklists and design filters for those business components.

- The Siebel Handheld administration screens include views for defining filters on business objects. Make sure that you define filters for any business object that has a large data set, and that you specify one default filter (for the business object) to avoid excessive data download.

Business component data filters must be configured to control the volume of data that is downloaded for offline operations. A number of generic data filters are set up by default for Siebel Mobile applications, but you can modify the default data filters to

suit your own business needs. For more information about configuring data filters, see Chapter 3, "Setting Up Siebel Mobile Disconnected Applications".

Customizing Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1.

You can use the Siebel Open UI framework, templates, and style sheets to configure the user interface and behavior of your Siebel Mobile application to address your own particular business needs. You can customize the look-and-feel of your mobile application by modifying the JavaScript files. You can also deploy your own presentation models and physical renderers that may or may not use one or more third-party JavaScript plug-ins of your choice.

The following customizations are recommended:

- Set up the jQuery grid (jqGrid) renderer so that the mobile application data displays in grid (tabular) format. For more information, go to http://www.trirand.com/blog/.

- Set up landscape and portrait layout for mobile applications so that the views are visible on tablets.

- Set up infinite scroll for mobile applications, which is a feature that allows you to scroll through records in a list applet indefinitely.

- Set up Location Services so that when you tap the Pin icon in mobile applications, a map window opens showing the location details.

- Set up transitions, themes, styles, and colors as required.

For more information about the Siebel Open UI templates and style sheets, about how to customize the look-and-feel of your mobile application features, and about how to implement each of these recommendations, see *Configuring Siebel Open UI*.

Related Topics

"Inline Editing" on page 8-7

"Check Boxes" on page 8-7

"Data Display" on page 8-7

"Displaying Location Details in Siebel Mobile" on page 8-17

"Configuring Application Settings for Siebel Mobile" on page 8-13

Copying and Deleting Siebel Mobile Applications

You can copy and delete duplicate copies of mobile applications in Siebel CRM as shown in the following procedure. You should not delete any Siebel-provided applications. Note the following:

- When you copy a mobile application, the application plus all the associated child business component records are copied.

- When you delete a mobile application, the application plus all the associated child business component records are deleted.

- Before deleting a mobile application, it is recommended that you make a copy of it first.

> **Note:** The Deep Copy and Deep Delete user properties are used to copy or delete records in Siebel Mobile. For more information about using Deep Copy and Deep Delete to copy and delete records in child business components, see *Siebel Developer's Reference*.

To copy and delete mobile applications in Siebel CRM

1. Log in to the Siebel Server using a user ID with a Siebel administrator responsibility.

2. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

3. Create a copy of an existing Siebel Mobile application as follows:

   a. Select an application from the top applet. For example:

      ```
      Siebel ePharma Mobile (ENU)
      ```

   b. Select Copy Record in the menu.

      A duplicate record is created for the Siebel Mobile application with the same Name and Language Code.

   c. In the Language Code field, select a different language code.

   d. Verify that the copy was successful by checking the records in the following child applets: Object Definition, Modification Tracking, Business Component Filters, Business Object Filters, and Settings.

4. Delete a duplicate or a copy of a Siebel Mobile application as follows, but do not delete any Siebel-provided applications:

   a. Select an application from the top applet. For example:

      ```
      Siebel ePharma Mobile (ITA)
      ```

   b. Select Delete Record in the menu, and then OK when prompted for confirmation to delete the selected Siebel Mobile application record.

      The record is deleted from the list of Siebel Mobile applications.

Troubleshooting Your Siebel Mobile Disconnected Application

Table 3–4 shows some common errors that users might encounter in general when trying to access and use Siebel Mobile disconnected applications on their mobile device.

Table 3–4   Troubleshooting Your Siebel Mobile Disconnected Application: Common Errors

Problem	Cause	Solution
The Siebel Mobile application user interface is not displaying correctly on the mobile device.	The Siebel Mobile application is not rendering correctly.	Check the browser that is being used on your mobile device. For information about Certifications, see Article ID 1492194.1 on My Oracle Support.
The Siebel Mobile application environment is not loading and a blank screen appears.	Private browsing is enabled for the browser on your mobile device.	Make sure that private browsing is not enabled for the browser on your mobile device. For more information, see "Disabling Private Browsing" on page 3-28.

If you get errors similar to the following:
 	
`Tag: swe:nav-control is not valid in this context.`
`. . .`
`Error creating Parameter:HighInteractivity for Comp:ePharmaMObjMgr_ENU @ in CompGroup:HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object...`
`Error creating Parameter:MobileApplication for Comp:ePharmaMObjMgr_ENU @ in CompGroup:HandheldSyncSIS Strict Flag set to FALSE, continuing with the next Object...`
	The Siebel Mobile application is not rendering correctly.	Make sure that the Siebel Application Object Manager parameters are configured correctly for your Siebel Mobile application.
		
		To set the parameters again, run the srvrmgr command for your Siebel Application Object Manager. For more information, see "Siebel Application Object Manager Parameters for Siebel Mobile Disconnected Applications" on page 3-6.

The Siebel Mobile application is not showing the latest information or most recent changes.	One or more files that your browser has cached have changed.	Clear your browser cache. For more information, see "Clearing the Browser Cache" on page 3-29.
The Siebel Mobile application keeps failing or locking.	The cause of this problem can be one or both of the following: ■ One or more files that your browser has cached has changed. ■ You have reached, are nearing, or have exceeded your browser cache limit. You must have a minimum of 50 megabytes (MB) of available storage on your mobile device.	Check your browser cache size to make sure that you have not exceeded your cache limit, remove any Web site data if required, and then clear your browser cache. For more information, see the following: ■ "Clearing the Browser Cache" on page 3-29 ■ "Checking the Browser Cache Size" on page 3-29

Table 3–5 shows some common logging errors that users might encounter, including how to debug the errors. You can use the Log button on the application banner to review the log messages and debug information for Siebel Mobile disconnected applications, provided that logging has been enabled for the application. For more information, see "Siebel Mobile Application Logging" on page 8-31.

Table 3–5   Troubleshooting Your Siebel Mobile Disconnected Application: Logging Errors

Problem	Cause	Solution

(1) Data created in offline mode is not visible in online mode after triggering a data upload.
 	
The log event setting is set to UpSync (to debug issues with uploading data in offline mode).
 	
Messages similar to the following examples appear in the log console:
 	
`SyncThreadHandler - OnCall, UpSync failed.`
`AppMgr - Ping, Pinging Server....`
`AppMgr - CheckServerConnection, Checking server connection....`
`AppMgr - CheckServerConnection, Network/Server is unavailable. Continuing in offline mode.`
`AppMgr - CheckServerConnection, Checking server connection.... Failed`
`AppMgr - Ping, Pinging Server.... Failed`
`SyncThreadHandler - OnCall, UpSync completed.`
	The cause of this problem can be one or more of the following:
	
	■ Failure to upload data.
	
	■ Conflicts after uploading data.
		The steps to debug using the logs are:
		
		■ Tap the bug icon on the application banner to open the log console.
		
		■ Review the log messages to check whether there was a failure in uploading data or if there was a server connection failure.
		
		■ In the case of an *UpSync or upload data failure* message, check the server logs for more detailed information.
		
		■ If the logs show an *UpSync completed* message, then check for conflicts.

(2) After tapping the GoOffline icon on the application banner, data extraction and the transition to offline mode is taking too long to complete.
 	
The log event setting is set to Data Extraction. Messages similar to the following examples appear in the log console:
 	
`ProactiveCacheBuilder - ParseData Table:PharmaProfessionalStateLicenses , Columns: 15, No. of records: 39`
`ProactiveCacheBuilder - ParseData, Creating table LSMessagingPlansBC`
`ProactiveCacheBuilder - Unique Keys, OwnerId,Version,Name`
 	
The syntax for these error messages is as follows:
 	
`ProactiveCacheBuilder - ParseData Table:<BusComp Name without alpha chars> , Columns: <# of columns>, No. of records: <#of records>.`
	The cause of this problem can be one or more of the following:
	
	Too many records were downloaded for some of the business components (BusComps).
	
	■ There were SQL errors when caching the downloaded records into the Web database.
	
	■ There were network issues (the server, component, or VPN is down) or appcache issues.
		The steps to debug using the logs are:
		
		■ After download, tap the bug icon on the application banner to open the log console.
		
		■ Verify the number of records downloaded for each business component (BusComp).
		
		■ For BusComps with large volumes of records, modify the filter specification accordingly so that fewer records will be downloaded in future.
		
		■ In the case of SQL errors, fix the issue as suggested by the error message in the log console.

(3) In offline mode when trying to save a newly created record, the following error message appears: `"Field '<FieldName> ' not found in BusComp."`	The field specified in the error message was not downloaded in offline mode.	The steps to debug are as follows: ■ Provided that the browser's debugging tool to view browser resources is available, then query the Web database to verify whether the field is available in the BusComp.

Table 3–5   (Cont.) Troubleshooting Your Siebel Mobile Disconnected Application: Logging Errors

Problem	Cause	Solution

(4) In offline mode when saving a newly created record, some default fields are populated with incorrect values and some fields are given validation error messages.
 	
The log event setting is set to Client System.
 	
Messages similar to the following examples appear in the log console:
 	
`BusComp - SetDefaultValues, where expression type is : PreDefault, BC name is: Action, field: Duration Minutes, value: 15, expression: "IIf ([IsiLog] = 'N', [Work Time Min],Expr: "LookupValue(""APPOINTMENT_ DURATION"", ""15"")")"`
 	
The syntax for this error message is as follows:
 	
`BusComp - SetDefaultValues, where expression type is : <expression type i.e. either PreDefault or PostDefault>, BC name is <bcname>, field: <field name>, value: <evaluated value>, expression: <expression>`
	There are issues in the Siebel Repository with the expressions configured for the PreDefault, PostDefault or ValidationSpec property of the BusComp field.	The steps to debug using the logs are:
		
		■ Tap the bug icon on the application banner to open the log console, and then tap Clear to clear any existing logs.
		
		■ Navigate to the view where the error occurs, and then create a new record and save it.
		
		■ Close any error message that appears, and then return to the log console.
		
		■ In the log console, search for log messages that start with the following:
		
		`"BusComp - SetDefaultValues..."`
		
		These log statements provide information about the PreDefault and PostDefault expressions that are set for fields when creating new records and the evaluated value. Verify whether the value was evaluated correctly.
		
		■ If the log console shows messages similar to the following, then the expression configured for the field in the Siebel repository is incorrect and must be fixed as indicated by the error message:
		
		`SyntaxError: Parse error on line #:`

Table 3–5   (Cont.) Troubleshooting Your Siebel Mobile Disconnected Application: Logging Errors

Problem	Cause	Solution

(4) Continued. Messages similar to the following examples appear in the log console:
 	
`SyntaxError: Parse error on line 1:`
`...s Stock Employee Id - Owned by Id]`
`= 'Y'`
`----------------------^`
`Expecting 'TOKEN_IDENTIFIER', ']',`
`'TOKEN_SPL_CHAR', 'TOKEN_NUMBER', got`
`'TOKEN_MINUS' Expression: [Is Product`
`Allocation Type] = 'Y' && [Owned By`
`Id] = LoginId() && [Stop Sampling`
`Flag] = LookupValue("BOOLEAN_`
`VALUE","N") && (([Active Flag] =`
`LookupValue ("BOOLEAN_VALUE","Y") &&`
`[Is Stock Employee Id - Owned by Id]`
`= 'Y' && [Is Lot Product Type] = 'Y'`
`&& [Is Lot Stock] = 'Y' && [Inventory`
`Audit Report Id] IS NULL ) ||`
`(([Inventory Flag] = 'N' ||`
`[Inventory Flag] IS NULL ) && ([Lot`
`Flag] = 'N' || [Lot Flag] IS NULL )))`
 	
The syntax for this error message is as follows:
 	
`SyntaxError: Parse error on line #:`
`<error message>  Expression:`
`<expression>`
		(4) Continued. The steps to debug using the logs are:
		
		■ If the browser's debugging tool to view the browser resources is available, then all expressions in the application can be verified by running the `SiebelApp.Metadata.VerifyExpressions()` API in the log console, and then checking the logs for errors.
		
		■ Run the `SiebelApp.Metadata.GetAllExpressions()` API in the log console to get a list of all expressions used in the application. That is, expressions used in all of the following:
		
		■ BusComp Field PreDefault, PostDefault, and ValidationSpec property.
		
		■ BusComp search specifications.
		
		■ Applet Search specification.
		
		■ CanInvokeMethod applet user property.
		
		■ OnFieldUpdateSet BusComp user properties.

Table 3–5   (Cont.) Troubleshooting Your Siebel Mobile Disconnected Application: Logging Errors

Problem	Cause	Solution

(5) In offline mode when trying to save a newly created record, the following error message appears:
 	
`"<FieldName> is a required Field.Enter an appropriate value.(SBL-UIJ-00126)"`
 	
The log event setting is set to Client System (to debug error messages displayed in offline mode).
 	
Messages similar to the following examples appear in the log console:
 	
`BusComp - SetDefaultValues, where expression type is : PreDefault, BC name is: Action, field: Duration Minutes, value: 15, expression: "IIf ([IsiLog] = 'N', [Work Time Min],Expr: "LookupValue(""APPOINTMENT_ DURATION"", ""15"")")"`
 	
The syntax for this error message is as follows:
 	
`BusComp - SetDefaultValues, where expression type is <expression type /PreDefault or PostDefault>, BC name is <bcname>, field is <field name>, value is <evaluated value>, and expression is <expression>.`
	The suspected causes of this problem are:
	
	■ The required <FieldName> is exposed in the UI with a red star (*) next to it, but the field contains no value.
	
	■ The required <FieldName> is not exposed in the UI and has a PreDefault or PostDefault expression to set its value when a new record is saved. The issue here could be one of the following:
	
	■ The expression failed to parse.
	
	■ The expression includes fields with no values (where no values are set), leading to an incorrect evaluation.
	
	■ The expression looks up a value in a particular LOV Type, but that LOV Type is not downloaded.
		The steps to debug this error using the logs are:
		
		■ Tap the bug icon on the application banner to open the log console, and then tap Clear to clear any existing logs.
		
		■ Navigate to the view where the error occurs, and then create a new record and save it.
		
		■ Close any error message that appears and then return to the log console.
		
		■ In the log console, search for log messages that start with the following:
		
		`BusComp - SetDefaultValues...`
		
		These log statements provide information about the PreDefault and PostDefault expressions that are set for fields when creating a new record and the evaluated value. Verify whether the value was evaluated correctly.
		
		■ If the expression contains functions similar to the following, then the expression verifies whether the LOV Type and the required value is downloaded in the local database:
		
		`LookupValue(<LOV Type>,<value to look up>)`

Table 3–5 (Cont.) Troubleshooting Your Siebel Mobile Disconnected Application: Logging Errors

Problem	Cause	Solution

(5) Continued. Messages similar to the following examples appear in the log console:
 	
`SyntaxError: Parse error on line 1:`
`...s Stock Employee Id - Owned by Id]`
`= 'Y'`
`----------------------^`
`Expecting 'TOKEN_IDENTIFIER', ']',`
`'TOKEN_SPL_CHAR', 'TOKEN_NUMBER', got`
`'TOKEN_MINUS' Expression: [Is Product`
`Allocation Type] = 'Y' && [Owned By`
`Id] = LoginId() && [Stop Sampling`
`Flag] = LookupValue("BOOLEAN_`
`VALUE","N") && (([Active Flag] =`
`LookupValue ("BOOLEAN_VALUE","Y") &&`
`[Is Stock Employee Id - Owned by Id]`
`= 'Y' && [Is Lot Product Type] = 'Y'`
`&& [Is Lot Stock] = 'Y' && [Inventory`
`Audit Report Id] IS NULL ) ||`
`(([Inventory Flag] = 'N' ||`
`[Inventory Flag] IS NULL ) && ([Lot`
`Flag] = 'N' || [Lot Flag] IS NULL )))`
 	
The syntax for this error message is as follows:
 	
`SyntaxError: Parse error on line #:`
`<error message>  Expression:`
`<expression>.`
		(5) Continued. The steps to debug this error using the logs are:
		
		■ If the log console shows log messages similar to the following, then the expression configured for the field in the Siebel repository is incorrect and must be fixed as indicated by the error message:
		
		`SyntaxError: Parse error on line #:`

(6) In offline mode, the applet shows an incorrect set of records or no records at all.
 	
The log event setting is set to Client System (to debug error messages displayed in offline mode).
 	
Messages similar to the following example appear in the log console:
 	
`BusComp - SearchSpec, Name: Pharma Professional Call - Mobile, SearchSpec: (( ("Category" = "Contact Call") OR  ("Category" = "Attendee Call")) OR  ("Category" = "Account Call"))`
 	
The syntax for this error message is as follows:
 	
`BusComp - SearchSpec, Name: <BusComp Name>, SearchSpec: <BusComp Search Spec>`
	The cause of this problem can be one or more of the following:
	
	■ The downloaded records do not satisfy the business component search specification.
	
	■ The visibility of the downloaded record does not match the visibility of the view in which the record is expected to be displayed.
	
	■ The filter specification that is applied to download the data is incorrect.
		The steps to debug using the logs are:
		
		■ Tap the bug icon on the application banner to open the log console, and then tap Clear to clear any existing logs.
		
		■ Navigate to the view where the error occurs.
		
		■ Check the logs to verify the business component search specification that was applied when the view was populated with records. Verify whether or not the missing records satisfied the search specification.
		
		■ If the browser's debugging tool to view the browser resources is available, then query the Web database to determine whether the required records are downloaded and the value in the PDAVisibilityTypes column for the records. Verify the visibility of records.
		
		■ Verify the filter specification applied to download the records.

Enabling JavaScript for Safari

To use Siebel Mobile applications on Safari, JavaScript must be enabled for Safari.

To enable JavaScript for Safari

1. Start your Safari browser.

2. Select Preferences from the Safari menu.

3. Click Security.

4. Select the Enable JavaScript option.

5. Close the Preferences window.

6. Close and restart Safari.

Disabling Private Browsing

If after logging into Siebel Mobile, the application environment will not load and a blank screen appears, then make sure that private browsing is not enabled for the browser on your mobile device. Private browsing mode will block any browser cache from registering, and prevent Siebel Mobile, which depends on caching, from running. The following procedure shows you how to disable private browsing in, for example, Safari on iPad.

To disable private browsing (for example, on iPad)

1. Tap Safari on the home screen of your iPad to start the browser.

2. Do one of the following as required:

   a. If using Apple iOS 7, then disable private browsing as follows:

      – Tap Show Pages (the Plus icon) in the lower right hand corner of the screen.

      – Tap Private in the lower left hand corner of the screen

      – If prompted to close or keep all current tabs open, select an option.

      – Tap Done in the lower right hand corner of the screen.

      Private browsing is now disabled for the mobile device, and the background color of the Safari browser changes to white or light gray.

      To enable private browsing for the mobile device, repeat this step again. When private browsing is enabled, the background color of the Safari browser is black or dark gray (and not white or light gray).

   b. If using Apple iOS 7.1 or later, then disable private browsing as follows:

      – Tap the URL field at the top of the screen.

      – When the keyboard opens, tap Private above the keyboard on the left hand side.

      – If prompted to close or keep all current tabs open, select an option.

      Private browsing is now disabled for the mobile device, and the background color of the Safari browser changes to white or light gray. To enable private browsing for the mobile device, repeat this step again. When private browsing is enabled, the background color of the Safari browser is black or dark gray (and not white or light gray).

Clearing the Browser Cache

The process of clearing the browser cache differs from browser to browser, but typically involves selecting an option to delete the cache or temporary files in your browser's administrative settings. After clearing your browser cache, refresh the page that you are viewing so that your browser can obtain the fresh files. The following procedure shows you how to clear the browser cache.

To clear the browser cache

1. On an iOS device (iPad or iPhone):

   a. Tap Settings, Safari, and then tap Clear Cookies and Data.

   b. Tap Clear when prompted for confirmation to clear all cookies and data.

   This step clears all the cached data that was used to speed up browsing.

   c. Refresh the page that you are viewing to obtain the latest files.

2. On an Android device (Samsung Galaxy tablet):

   a. Open the Web browser on your mobile device.

   b. Tap Menu, select Settings, tap Privacy and Security, and then to one or both of the following as required:

   – Tap Clear all cookie data to clear all browser cookies.

   – Tap Clear browser cache to delete locally cached content and databases.

   c. Refresh the page that you are viewing to obtain the latest files.

Checking the Browser Cache Size

To successfully use Siebel Mobile applications in offline mode, you must have a minimum of 50 megabytes (MB) of available storage on your mobile device. The following procedure shows you how to check the browser cache size in Safari on iPad so that you are within the cache limit and how to delete the Web site data if required. The procedure is similar on Android devices.

To check the browser cache size (for example, on iPad)

1. Tap Settings, Safari, Advanced, and then tap Website Data.

   Review the amount of data stored for each Web site and the total amount of Web site data stored on your iPad.

2. Remove the data for any Web site whose data has been updated recently or is no longer required as follows:

   ■ Tap Edit.

   ■ Select the Web site whose data you want to remove, and then tap Delete.

4

Siebel Mobile Disconnected Application Administration

This chapter describes how to administer Siebel Mobile disconnected applications. It includes the following topics:

- Setting Up Users for Siebel Mobile Disconnected Applications
- Configuring Access to Views for Siebel Mobile Disconnected Applications
- Administration Screen Settings for Siebel Mobile Disconnected Applications
- Configuring Application Settings for Siebel Mobile Disconnected Applications
- Configuring Component-Level Settings for Siebel Mobile Disconnected Applications
- Thread Throttling for Siebel Mobile Disconnected Applications
- Load Balancing Support for Synchronization
- Configuring Synchronization for Siebel Mobile Disconnected Applications
- Monitoring Synchronization Sessions for Siebel Mobile Disconnected Applications
- Troubleshooting Synchronization Failures Due to Business Component Filters

> **Note:** By default, most of the parameters referenced in this chapter are not automatically available as options in the menus of your Siebel Mobile disconnected application, and as a result they are not set in the default configuration. If you want to make these and any other new parameters available, then you must add them to your Siebel Mobile disconnected application by creating a new parameter record for each parameter that you want to make available.

Setting Up Users for Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1. To set up users for a Siebel Mobile disconnected application, you must perform a number of tasks. The tasks that you must perform include the following:

- Create user accounts and assign passwords for each user of the Siebel Mobile disconnected application. For more information, see *Siebel Applications Administration Guide*.

- Assign responsibilities (user roles) for each user of the Siebel Mobile disconnected application and associate user responsibilities with the Siebel Mobile application views. For more information, see the following:

  - "Assigning Responsibilities to Siebel Mobile Disconnected Application Users" on page 3-11

  - "Configuring Access to Views for Siebel Mobile Disconnected Applications" on page 4-2

- "Adding Business Component Filters for Siebel Mobile Disconnected Application Users" on page 4-2

- "Adding Business Object Filters for Siebel Mobile Disconnected Application Users" on page 4-2

Adding Business Component Filters for Siebel Mobile Disconnected Application Users

The Business Components Filters tab in the Administration - Siebel Mobile, Application Administration view contains the synchronization filter settings for business components. If you want to restrict the contents of selected business components to reduce the data set that is visible to your users, then you can change the filter settings in this view. For more information about adding business component filters, see the following:

- "Constructing Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2

- "Setting Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2

- "Removing a Business Component Filter Setting" on page 5-4

- "Configuring Business Component Filters for Pop-up Applets" on page 5-4

Adding Business Object Filters for Siebel Mobile Disconnected Application Users

The Business Object Filters tab in the Administration - Siebel Mobile, Application Administration view contains the synchronization filter settings for business objects. If you want to ensure that users avoid downloading too many records, then you can change the filter settings in this view. For more information about adding business object filters, see the following:

- "Constructing Business Object Filters for Siebel Mobile Disconnected Applications" on page 5-5

- "Setting Business Object Filters for Siebel Mobile Disconnected Applications" on page 5-6

- "Removing a Business Object Filter Setting" on page 5-7

- "Business Object Filter Chaining" on page 5-7

Configuring Access to Views for Siebel Mobile Disconnected Applications

Certain views in Siebel Mobile are useful only when there is connectivity as they are used, for example, to update information in real-time. Because such views do not serve an important purpose in offline mode, it is recommended that you do not download these views to the client as they only take up valuable browser storage space. As a general rule, if the mobile application has views that are useful in online but not in offline mode, then those views along with their data must not be downloaded to the

client device in offline mode. For example, the Siebel Mobile application for Siebel Service has some views related to Shifts, Breaks and POUs which are useful only when there is connectivity.

Each view and responsibility in Siebel CRM has a Local Access flag. You can use the Local Access flag to control which views mobile users can access when using Siebel Mobile disconnected as follows:

■ When Local Access is set to TRUE (checked), all users with the view in one of their responsibilities can access the view when using the Siebel Mobile disconnected application.

■ When Local Access is set to FALSE (unchecked), users cannot access the view when using the Siebel Mobile disconnected application.

The following procedures show you how to limit the views that the Siebel Mobile disconnected application displays.

■ "Limiting Access to Views by Modifying Responsibilities" on page 4-3

■ "Limiting Access to Views for All Responsibilities Globally" on page 4-4

For more information about defining local access to views, see *Siebel Remote and Replication Manager Administration Guide*. For more information about responsibilities and access control, see *Siebel Security Guide*.

Limiting Access to Views by Modifying Responsibilities

This topic shows you how to limit the views that the Siebel Mobile disconnected application displays by modifying access to the view for a user responsibility.

To limit access to views by modifying a responsibility

1. Identify the views that users will not require in offline mode.

2. Log in to the Siebel application as a user with administrator privileges.

3. Navigate to the Administration - Application screen, then the Responsibilities view.

4. Query for and select the appropriate responsibility or user role where you want to limit access.

   For example, query for Service Administrator.

5. Select the Responsibilities tab, and then do the following:

   a. In the lower Users applet, review and update the list of users assigned to the responsibility as required.

   b. In the lower Views applet, deselect the Local Access check box for each view that you do not want to display in offline mode.

      For example, deselect the Local Access check box for the following Siebel Mobile application for Siebel Service views, which are not required in offline mode:

      ```
      SHCE Technician Breaks View - Mobile
      SHCE Technician POU View - Mobile
      SHCE Technician Shifts View - Mobile
      ```

> **Note:** The Local Access check box is selected by default for all views, which means that all mobile application views are downloaded to client devices and available to users in offline mode by default.

6. Repeat Step 4. and Step 5. for each additional responsibility that contains views which are not required in offline mode.

7. Inform users as required to log out, and then log back in to the Siebel Mobile application for the changes to take effect.

Related Topics

"Assigning Responsibilities to Siebel Mobile Disconnected Application Users" on page 3-11

"Setting Up Users for Siebel Mobile Disconnected Applications" on page 4-1

Limiting Access to Views for All Responsibilities Globally

This topic shows you how to limit the views that the Siebel Mobile disconnected application displays by modifying access to the view for every responsibility globally that is associated with the view.

To limit access to views for all responsibilities globally

1. Identify the views that users will not require in offline mode.

2. Log in to the Siebel application as a user with administrator privileges.

3. Navigate to the Administration - Application screen, then the Views view.

4. Query for the appropriate view where you want to limit access.

   For example, query for the following: SHCE Technician Breaks View - Mobile.

5. Deselect the Default Local Access check box for the view.

   The Default Local Access setting determines whether a view is available for the users that are assigned to the responsibilities that are associated with this view.

6. Repeat Step 4. and Step 5. for each view where you want to limit access for every responsibility that references the view.

Related Topics

"Assigning Responsibilities to Siebel Mobile Disconnected Application Users" on page 3-11

Setting Up Users for Siebel Mobile Disconnected Applications

Administration Screen Settings for Siebel Mobile Disconnected Applications

Administration screen settings for Siebel Mobile can appear at three levels: application, component, or user. Certain settings are allowed only at specific levels. There are also two types of settings:

■ **Single-line setting.** For this setting, only one row can contain a unique setting name at a given level. Thus, a single-line setting at the User level can be used only once at that level. For single-line settings, the Sequence column must always

contain a value of zero. For single-line settings, you can leave the sequence column value unchanged, which results in a default value of zero being assigned.

- **Multi-line settings.** For this setting, the sequence column is necessary to allow multiple rows. The sequence column has no effect on actual processing, but is part of the logical key in the database table. When you create a new record in this database table, the record must have a unique logical key. For multi-line settings, each line must include a different sequence number to avoid logical key conflicts.

If the combination of setting name and sequence number is not unique for a particular parent record (application, component, or user), then you get an error message when stepping off or saving the record. Multi-line entries must contain the correct key values before they can be saved to the database.

About the Rules for an Override

The rules for an override are that any setting, whether a single-line setting or multi-line setting, specified at the lower levels also overrides that same setting name at higher levels. Thus the settings at the application level apply unless specific settings are overridden for a particular component or a particular user. When an override occurs, it occurs for the complete setting name. Thus, if a particular multi-line setting has three rows at the user level and twelve rows at the application level, then the resulting multi-line setting value for that setting contains only the three rows at the user level. An override mechanism also allows a setting to be removed, rather than replaced.

Removing a Setting from a Higher Level

The following procedure shows how to remove a setting from a higher level.

To remove a setting from a higher level

- Specify the setting name that you want to remove, with an empty setting value.

Related Topic

"Configuring Application Settings for Siebel Mobile Disconnected Applications" on page 4-5

Configuring Application Settings for Siebel Mobile Disconnected Applications

The Administration - Siebel Mobile, Application Administration view lists all the mobile applications that are available within your enterprise. From the Application Administration view, you c an create new application settings, change default settings, and administer settings that have already been created. Some of the settings are described in Table 4–1.

The following tabs, which are available from the Application Administration view, are used by the synchronization engine to extract application definition and user data:

- **Business Component Filters.** Use this tab to define the synchronization filter settings for business components. For more information, see "Adding Business Component Filters for Siebel Mobile Disconnected Application Users" on page 4-2.

- **Business Object Filters.** Use this tab to define the business object level filters, which restrict data that is downloaded to the mobile client application upon synchronization. For more information, see "Adding Business Object Filters for Siebel Mobile Disconnected Application Users" on page 4-2.

- **Settings.** Use this tab to define parameter settings for your application. For more information, see the following:

    - "Configuring a New Application Setting" on page 4-6

    - "Configuring a DefaultBusObj Setting Value with More Than 2000 Characters" on page 4-6

    - "Extracting Non-UI Fields During Synchronization" on page 4-7

    - "Configuring the ApplicationDirectory Setting" on page 4-7

    - "Application Settings for Siebel Mobile Disconnected Applications" on page 4-9

Note: You use the User Administration view and its tabs in a similar way to how you use the Application Administration view and its tabs, except that you are configuring business components, business objects, and user settings at the user level rather than at the application level. The mobile application is populated with the user administration data when the user performs a synchronization. The user administration settings override the Siebel Server component-level and application-level settings.

Configuring a New Application Setting

The following procedure shows how to configure a new application setting. This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1.

To configure a new application setting

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Select the appropriate mobile application from the top applet.

3. Click the Settings tab, and then click New.

4. Click the name field, and select the setting you require.

5. Click the Value field, and enter the text of the setting.

Configuring a DefaultBusObj Setting Value with More Than 2000 Characters

The Siebel Mobile disconnected application setting value field has a limit of 2000 characters. The following procedure shows how to create a default business object (DefaultBusObj) setting value with more than 2000 characters.

To configure a default business object setting value with more than 2000 characters

1. Break the value into multiple lines of DefaultBusObj settings.

2. Enter these settings using the same DefaultBusObj value format:

   ```
   BusObj|Visibility|Query|BusComp_1|query specifications_1[|BusComp_n|query
   specifications_n]
   ```

   When defining multiple lines of DefaultBusObj settings for a single business object, all view modes and filters must match. If a business component is found in multiple DefaultBusObj settings for a single business object, then the business component's query specifications are concatenated with a space and appended to

the previous business component's query specifications. You must be aware of this effect in order to decide if both query specifications must be combined with an OR operator or AND operator.

The DefaultBCuserProps and DefaultFields settings for a single business component can also be broken into multiple lines of settings if their values exceed 2000 characters. These settings must all be entered using the same value format as well:

```
BusComp|BCUserProp_1[|BCUserProp_n] or BusComp|Field_1[|Field_n]
```

Extracting Non-UI Fields During Synchronization

Fields displayed in the UI and fields that are part of the calculated field are extracted to the Siebel Mobile disconnected application during the synchronization process. However, not all fields in the business component are extracted. Often, you might have to refer to other fields in the user property that are either not exposed in the UI or they are calculated fields. For example, a user enters a value in the Amount field through the UI. This action updates a value in the Status field, but the Status field is not displayed in the UI and therefore is not automatically extracted to the Siebel Mobile disconnected application. Such fields must be sent to the Siebel Mobile disconnected application during synchronization.

> **Note:** Calculated fields are downloaded from the Siebel Server and appear in the Siebel Mobile disconnected application. In offline mode, the calculated values for the new records created are set based on the fields available offline.

To extract specific non-UI fields during synchronization

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Click the Settings tab.

   You use the Settings tab to define the parameter settings for your application.

3. Select, for example, Siebel ePharma Mobile Application Name.

4. Click Query, enter Account, and click Execute Query.

5. Select the DefaultFields Directive for the Account business component, and add the following to the end of the Value column:

   ```
   |Start Time|End Time
   ```

Configuring the ApplicationDirectory Setting

ApplicationDirectory is an application-level parameter that is defined in the Administration - Siebel Mobile, Application Administration, Settings view. The default value for this parameter in the standard product is hhsync\app_name, where app_ name is the name of the application, such as sales or service, and so on. You can set this parameter using the following procedure. The following procedure shows how to set the ApplicationDirectory parameter. This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1.

To set the ApplicationDirectory parameter

1. Log in to the Siebel Server using a user ID with a Siebel administrator responsibility.

2. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

3. Select the appropriate application (for example, Siebel ePharma Mobile) from the top applet.

4. Click the Settings tab, and set the value of the ApplicationDirectory parameter to be the shared network location using a UNC format, for example, as follows:

   ```
   \\shareddsk\hhsync\phm
   ```

5. Save the change.

6. Restart the Siebel Application Object Manager server component for the Siebel Mobile disconnected application.

   > **Note:** The location for the ApplicationDirectory must be a networked, high performance, highly available drive. SAN (Storage Area Network) or NAS (Network Access Server) with a high RAID (Redundant Array of Independent Disks) rating is a good option for this purpose.

Configuring the Application Directory Setting for Multiple Servers

The following procedure shows you how to set the Application Directory parameter for Siebel Mobile disconnected applications in a multiple server or hybrid environment (for example, Microsoft Windows and UNIX).

To configure the Application Directory setting for multiple servers

1. Set up a shared CIFS (or Samba) FileSystem folder between Windows and UNIX servers.

   On Windows for example, a folder called mobile is created on the c:\ drive (`c:\mobile`) and Siebel Servers are installed under `C:\23044\ses\siebsrvr`.

   On Linux for example, a folder called mobile is mounted as `/somepath/mobile` (which points to the Windows folder) and Siebel Servers are installed under `/export/home/siebelqa1/23044/ses/siebsrvr`.

2. Create the hhsync subfolder `c:\mobile\hhsync` as follows:

   ```
   mkdir c:\mobile\hhsync
   ```

3. On Windows, use mklink to link `siebsrvr\hhsync` to the shared folder `c:\23044\ses\siebsrvr` as follows:

   ```
   C:\23044\ses\siebsrvr> mklink /D C:\23044\ses\siebsrvr\hhsync
   c:\mobile\hhsync
   ```

4. On UNIX, link `siebsrvr/hhsync` to the shared folder as follows:

   ```
   ln -s /somepath/mobile/hhsync
   /export/home/siebelqa1/23044/ses/siebsrvr/hhsync
   ```

5. Log into the Siebel Server using a user ID with a Siebel administrator responsibility, and then do the following:

a. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

b. Select the appropriate application (for example, Siebel ePharma Mobile) from the top applet.

c. Click the Settings tab, and set the value of the Application Directory parameter to `hhsync/phm`.

On Microsoft Windows, this points to: `.\siebsrvr\hhsync\phm`.

On Linux, this points to: `./siebsrvr/hhsync/phm`.

d. Save the change and restart the Siebel Application Object Manager server component for the Siebel Mobile disconnected application.

Application Settings for Siebel Mobile Disconnected Applications

Table 4–1 describes the application settings that you can configure for Siebel Mobile disconnected applications.

Table 4–1   Application Settings for Siebel Mobile Disconnected Applications

Product Group	Server Components
ApplicationDirectory	Single-line setting. Specifies the working directory (UNC path) for the Siebel Mobile disconnected application synchronization component where user data is stored.
	A valid value for ApplicationDirectory is as follows:
	`\\server name\directory name`
DBExtractThreadLoad	Single-line setting. This parameter enables thread-throttling functionality for database-extraction threads. DBExtractThreadLoad is the load (or weight) that is assigned to each individual, database-extraction thread. For each running database-extraction thread, this load value is used to determine the total system load, which is then compared with the MaxTotalThreadLoads value. A new thread is started only if the total system load does not exceed the MaxTotalThreadLoads value. A value of zero disables throttling of the database-extraction threads. The default value is 2.
	A valid value for DBExtractThreadLoad is any integer greater than or equal to zero (0).
DefaultBusObj	Multi-line setting. This parameter is used to force the extraction of a business object and its designated business components. DefaultBusObj is typically used when a business component is not extracted because it is not specified by using the DefaultView setting and is required for the application to function correctly. This setting is also used to designate business components that function as reverse business objects (RBOs). For more information about QBE (query by example) structure, see "Constructing Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2.
	Valid values for DefaultBusObj are as follows:
	`Business Object Name|Visibility Level||Business Component Name|QBE query construct`
	For more information, see "Configuring a DefaultBusObj Setting Value with More Than 2000 Characters" on page 4-6.

Table 4–1 (Cont.) Application Settings for Siebel Mobile Disconnected Applications

Product Group	Server Components
DefaultFields	Multi-line setting. This parameter is used to force the extraction of fields for a particular business component, which is typically the case where the business component is extracted through the DefaultView setting. However, because the field is not visible on the applet, it is not extracted. Also when a hidden business component is extracted through the DefaultBusObj setting, it is necessary to specify all of the fields that must be extracted for the business component. If no fields are specified using this setting, then the business component is not extracted in this case. Valid values for DefaultFields are as follows: `Business Component Name|Field1|Field2|…` For more information, see "Extracting Non-UI Fields During Synchronization" on page 4-7.
DefaultHandheldInsertMode	Single-line setting. This parameter enables the processing of insert operation failures for synchronization. If DefaultHandheldInsertMode is enabled, then synchronization stops when it encounters a data conflict during an insert operation. Users or administrators must resolve the data conflict before synchronization can resume. This feature is disabled by default. Valid values for DefaultHandheldInsertMode include one of the following: ■ NoFail ■ FailOnError
EnableBatchExtraction	Single-line setting. This parameter enables or disables the batch synchronization functionality. Disable batch synchronization is the default. For more information about batch synchronization, see "Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16.
EnableThrottleDebugMode	Single-line setting. This parameter enables or disables thread-throttling functionality. Valid values for EnableThrottleDebugMode are TRUE or FALSE.
MaxThrottleWaitTime	Single-line setting. This parameter is used for thread-throttling functionality. MaxThrottleWaitTime is the upper limit on the amount of time (in minutes) that any individual throttling request is allowed to wait. The default value is 5. A valid value for MaxThrottleWaitTime is any integer greater than or equal to zero (0).
MaxTotalThreadLoads	Single-line setting. This parameter is used for thread-throttling functionality. It defines the maximum number of total thread loads (determined by DBExtractThreadLoad and TranProcThreadLoad for each type of thread) that will be allowed to run for the scope defined by ThreadThrottleScope. If a throttling request is made that causes this maximum to be exceeded, then the requesting thread is delayed. The default value is zero, which disables the throttling mechanism. A valid value for MaxTotalThreadLoads is any integer greater than or equal to zero (0).

Table 4–1   (Cont.) Application Settings for Siebel Mobile Disconnected Applications

Product Group	Server Components
ThreadThrottleScope	Single-line setting. This parameter is used with thread-throttling functionality. It defines the scope of the thread-throttling mechanism by using one of two different modes: ■ **Process Thread.** Where thread throttling occurs independently in each process. ■ **Application.** Where thread throttling occurs in all processes running the same synchronization application on a single server. Only the first character of the ThreadThrottleScope parameter is used to determine the value. All other characters are ignored. Thus aardvark is interpreted as Application. Case is also ignored. The default value is Application. Valid values for ThreadThrottleScope include Application or Process Thread.
TranProcThreadLoad	Single-line setting. This parameter is used with thread-throttling functionality. It defines the load (or weight) that is assigned to each individual, transaction-processing thread. For each running transaction processing thread, this load value is used to determine the total system load, which is then compared with the MaxTotalThreadLoads value. A new thread is started only if the total-system load does not exceed the MaxTotalThreadLoads value. A value of zero disables thread throttling of the transaction-processing threads. The default value is 3. A valid value for TranProcThreadLoad is any integer greater than or equal to zero (0).
TranProcThreshold	Single-line setting. This parameter is used with thread-throttling functionality. It specifies the minimum time (in minutes) that the Transaction Processor continues processing transactions before performing a handshake with the client. After this value is exceeded, a handshake occurs instead of starting to process the next transaction. Doing so prevents the client from timing out the session when thread throttling is enabled. The default value is 5. A valid value for TranProcThreshold is any integer greater than or equal to zero (0).

Configuring Component-Level Settings for Siebel Mobile Disconnected Applications

You administer server components for your mobile application from the Administration - Mobile screen, Server Component Administration view. The Server Component Administration view enables you to manage server-level settings for synchronization components. These settings are used by the synchronization engine to extract application definition and user data. These settings override the application-level settings at the component level on a specific server. The data entered here is used by the synchronization engine when the user synchronizes with the Siebel Server.

The server-component settings are used primarily for the functionality that is required for individual server components. For example, thread throttling depends on the components running on a particular server and is best set at the Siebel Mobile disconnected application server component level. Examples of settings that might be

made at the component level are: MaxTotalThreadLoads, TranProcThreadLoad, DBExtractThreadLoad, and so on. Generally, the settings made at the application level are shared by all server components.

The following procedure shows how to configure component-level settings for mobile applications. This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1..

To configure component-level settings for Siebel Mobile disconnected applications

1. Navigate to the Administration - Mobile screen, then the Server Component Administration view.

   This view shows a list of server components associated with the application that is selected in the Siebel Mobile Setup view.

2. For each server component listed, do the following:

   a. Make sure that the Name field value matches the exact component name, such as ePharmaMObjMgr_enu, of the synchronization server component for the Siebel Mobile disconnected application.

   b. In the lower Settings applet, review or update the associated settings as required.

Thread Throttling for Siebel Mobile Disconnected Applications

Thread throttling is a synchronization event that occurs when a large number of users attempt to synchronize simultaneously, and the load on a single server can become too much. Thread throttling significantly reduces the total number of transaction processor threads that are active simultaneously and database extraction threads. Thread throttling increases the throughput for synchronization, without reducing the number of concurrent users. Synchronization performance worsens slightly, but the synchronization will complete for all users.

Thread throttling allows the maximum number of concurrent users. It maximizes the usage of the Siebel Server during any mixture of transaction-processing threads and database-extraction threads. Thus, if the Siebel Mobile disconnected application server supports x concurrent transaction-processing threads, then it allows x number of transaction-processing threads while disallowing all database-extraction threads.

Similarly, if the server supports y concurrent database-extraction threads, then it allows this number of database-extraction threads while disallowing all transaction-processing threads. If less than x transaction-processing threads are currently active, then some database-extraction threads are allowed to execute concurrently. Similarly, if less than y database-extraction threads are currently active, then some transaction-processing threads are allowed to execute simultaneously. For information about the settings for thread throttling and about how to enable thread throttling, see "Configuring Application Settings for Siebel Mobile Disconnected Applications" on page 4-5.

Load Balancing Support for Synchronization

Load balancing distributes the workload for multiple Siebel Servers. You can load-balance the synchronization of the Siebel Mobile disconnected application at the Siebel Server level to achieve better scalability and high availability. This capability removes the limitation of assigning users to a specific application Siebel Server at installation time.

Supported Load Balancers for Synchronization

The load balancers used for synchronization are the same as those for Siebel Business Applications. You can use either the native load balancer or a third-party HTTP load balancer.

For information about configuring native Siebel Server load balancing or third-party load balancing (which depends on the third-party product), see *Siebel Installation Guide* for the operating system you are using and *Siebel Deployment Planning Guide*.

Unique Synchronization Directory on Siebel Server

The Siebel Server uses a location on the server to store users' extracted files and state information. Each user and mobile application combination has a unique synchronization directory. The ApplicationDirectory user parameter enables the administrator to define this location. For information about setting the ApplicationDirectory user parameter, see "Configuring the ApplicationDirectory Setting" on page 4-7.

By defining a shared location for this parameter, synchronization services for Siebel Mobile disconnected applications can be load-balanced. When users request a synchronization session, their request is directed (by a load-balancer) to an available Siebel Server hosting the appropriate Siebel Mobile Application Object Manager, which will be able to access the users' synchronization directory. For example, a Siebel Mobile disconnected application can be configured to point to a generic URL for synchronization.

Load Balancing When Synchronization is Configured for Siebel Mobile

If multiple servers are configured with load balancing for the Siebel Mobile disconnected application when synchronization is also configured for the application, then all requests are routed to only one server. To change this so that requests are routed to all load balanced servers, complete the steps in the following procedure.

To load balance when synchronization is configured for Siebel Mobile

1. Using Siebel Server Manager, set the MaxTasks and MaxMTServers parameters.

2. Set the following parameters:

   - **MobileSync.** Set the Disconnected Mobile Synchronization component group. (set componentgroup=MobileSync). For more information, see the first step in "Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8.

   - **MobileDbXtract.** Set the Data Extraction component to whichever component is being used for the mobile data extraction (for example, set component= ServiceMobileDbXtract_enu). For more information, see the second step in "Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8.

   - **HonorMaxTasks.** Set the HonorMaxTasks parameter to True.

     – To check the existing value of HonorMaxTasks from the command line:

       ```
       list advanced param HonorMaxTasks for com <comp_name>
       ```

     – To set HonorMaxTasks from the command line:

       ```
       change advanced param HonorMaxTasks=True for comp <comp_name>
       ```

- To check (and if required reset) the existing value of HonorMaxTasks from the Siebel business application user interface:

  Navigate to the Administration - Server Configuration screen, then the Servers, Components, Parameters view.

  Click the Advanced button in the Parameters applet, and then query for the HonorMaxTasks parameter.

For more information about the MaxTasks, MaxMTServers, and HonorMaxTasks parameters and setting them, see *Siebel System Administration Guide* and *Siebel Performance Tuning Guide*.

Configuring Synchronization for Siebel Mobile Disconnected Applications

This topic describes how to configure synchronization for Siebel Mobile disconnected applications in general. There are four types of synchronization: full synchronization, incremental synchronization, full synchronization always, and batch synchronization. It includes the following information:

- "Enabling Full Synchronization for Siebel Mobile Disconnected Applications" on page 4-14

- "Enabling Incremental Synchronization for Siebel Mobile Disconnected Applications" on page 4-15

- "Configuring Business Components for Full Synchronization Always" on page 4-16

- "Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16

Enabling Full Synchronization for Siebel Mobile Disconnected Applications

A full data and metadata download process is always initiated from Siebel Server to a mobile device when the mobile device switches to offline mode for the first time. But when the mobile device subsequently switches to offline mode, then either a full or incremental synchronization process is initiated according to how the Siebel Mobile Always Full Sync system preference is set.

If Siebel Mobile Always Full Sync is set to Y or Yes, then full synchronization is enabled and a full data and metadata download takes place between Siebel Mobile and the mobile client whenever the mobile client sends a synchronization request to the Siebel Server.

To enable full synchronization for Siebel Mobile disconnected applications

1. Log in to the Siebel application as a user with administrator privileges.

2. Navigate to the Administration - Application screen, then the System Preferences view.

3. Search for and set the Siebel Mobile Always Full Sync system preference to Y or Yes.

   The default setting for Siebel Mobile Always Full Sync is N or No, which means that incremental synchronization is enabled by default for Siebel Mobile disconnected applications.

4. Restart Siebel Servers for the changes to take effect.

Related Topics

"Switching to Offline Mode for the First Time" on page 8-37

"Enabling Incremental Synchronization for Siebel Mobile Disconnected Applications" on page 4-15

"Configuring Business Components for Full Synchronization Always" on page 4-16

"Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16

Enabling Incremental Synchronization for Siebel Mobile Disconnected Applications

A full data and metadata download process is always initiated from Siebel Server to a mobile device when the mobile device switches to offline mode for the first time. But when the mobile device subsequently switches to offline mode, then either a full or incremental synchronization process is initiated according to how the Siebel Mobile Always Full Sync system preference is set.

If Siebel Mobile Always Full Sync is set to N or No, then incremental synchronization is enabled and an incremental or partial data and metadata download takes place between Siebel Mobile and the mobile client whenever the mobile client sends a synchronization request to the Siebel Server.

Incremental synchronization is enabled by default for Siebel Mobile disconnected applications.

> **Note:** Business components that are configured for full synchronization always are fully synchronized even when incremental synchronization is enabled for the application. For more information, see "Configuring Business Components for Full Synchronization Always" on page 4-16.

To enable incremental synchronization for Siebel Mobile disconnected applications

1. Log in to the Siebel application as a user with administrator privileges.

2. Navigate to the Administration - Application screen, then the System Preferences view.

3. Search for and set the Siebel Mobile Always Full Sync system preference to N or No (if not already done so).

   The default setting for Siebel Mobile Always Full Sync is N or No, which means that incremental synchronization is enabled by default for Siebel Mobile disconnected applications.

4. Configure incremental synchronization as shown in "Roadmap for Configuring Incremental Synchronization for Siebel Mobile" on page 6-6.

Related Topics

"Switching to Offline Mode for the First Time" on page 8-37

"Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16

Configuring Business Components for Full Synchronization Always

> **Note:** This procedure is supported but not recommended for Siebel Mobile disconnected.

The following procedure shows you how to configure business components for full synchronization always where objects are fully synchronized even if incremental synchronization is enabled for the Siebel Mobile disconnected application. Full synchronization is where a full data and metadata download takes place between Siebel Mobile and the mobile client whenever the mobile client sends a synchronization request to the Siebel Server.

To configure objects for full synchronization

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Select the mobile application from the top applet.

3. Query for the Always Full Download - BusComp setting, and then in the Value field select the dynamic business component.

   In the following example, Calls is selected in the Value field for the Always Full Download - BusComp setting. This means that full synchronization will always be performed for Calls even if incremental synchronization is enabled for the application.

   Name: Always Full Download - BusComp

   Value: Calls

   You can specify more than one business component as the value for Always Full Download - Buscomp and the list of business components must be separated by |. For example:

   ```
   Calls|Pharma Professional Call - Mobile|Contact
   ```

Related Topics

"Enabling Full Synchronization for Siebel Mobile Disconnected Applications" on page 4-14

"Configuring Batch Synchronization for Siebel Mobile Disconnected Applications" on page 4-16

Configuring Batch Synchronization for Siebel Mobile Disconnected Applications

Configuring batch synchronization for a Siebel Mobile application involves creating the Data Extraction Component for the application first if required and then configuring the settings, including batch synchronization, for the mobile application. After that you configure the appropriate business object filters for the mobile application, and then synchronization for the mobile application as required.

Note the following about batch synchronization:

- Batch synchronization is set up for the Siebel Mobile application for Siebel Pharma by default, so it is not necessary to configure it for the application again.

- Where there are multiple Siebel Servers, make sure that only one batch synchronization process is running per enterprise.

To configure batch synchronization for Siebel Mobile applications

1. Verify that the MobileSync component group is enabled for Siebel Mobile.

   For more information, see (the first step in) "Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8.

2. If required, create the Data Extraction Component for the mobile application.

   For more information, see (the second step in) "Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8.

3. Configure the settings for the mobile application as follows:

   a. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

   b. Select the mobile application from the top applet. For example: Siebel Service for Mobile.

   c. Click the Settings tab, and then do the following:

      – Click New, select Data Extraction Component in the Name field, and then select the actual data extraction component (for example: ServicemDbXtract) in the Value field.

      – Click New, select Enable Batch Extraction in the Name field, and then select True in the Value field.

      The Enable Batch Extraction parameter enables (True) the batch synchronization functionality. Enable batch synchronization is the default. Setting Enable Batch Extraction to False supports On Demand synchronization at run time.

      Note: On Demand batch synchronization is supported but not recommended for Siebel Mobile.
      ---

   d. Restart the Siebel Server for the changes to take effect.

      After the changes take effect, batch synchronization is enabled for the mobile application.

4. Configure business object filters with chained data extraction for the mobile application.

   The following table shows some example business object filters with chained data extraction. For more information about business object filters, see "Constructing Business Object Filters for Siebel Mobile Disconnected Applications" on page 5-5.

Default	Business Object	Name	Query
Yes	Pharma Professional Call - Mobile	PH1	'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() - 5) AND ([Start Date] <= Today() + 5)" AddSearch(("Pharma Professional Call - Mobile.Contact Id","PH2.Contact"),("Pharma Professional Call - Mobile.Account Id","PH3.Account"))

Default	Business Object	Name	Query
Yes	Contact	PH2	'Contact'.Search = "[My Position Id] = PositionId()" 'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() - 10) AND ([Start Date] <= Today() + 10)" AddSearch(("Pharma Professional Call - Mobile","PH1.Pharma Professional Call - Mobile")("Contact.Id","PH2.Contact"))
Yes	Account	PH3	'Account'.Search = "[Type] = LookupValue (""ACCOUNT_TYPE"", ""Hospital"") AND [My Position Id] = PositionId()" 'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() -10) AND ([Start Date] <= Today() + 10)" AddSearch(("Pharma Professional Call - Mobile","PH1.Pharma Professional Call - Mobile"),("Contact","PH2.Contact"),("Affiliated Account.Party Id","Account")("Account.Id","PH3.Account"))

5. Configure synchronization for the mobile application as required.

For more information, see the following topics:

- "Enabling Full Synchronization for Siebel Mobile Disconnected Applications" on page 4-14

- "Enabling Incremental Synchronization for Siebel Mobile Disconnected Applications" on page 4-15

- "Configuring Business Components for Full Synchronization Always" on page 4-16

Related Topic

"Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8

Monitoring Synchronization Sessions for Siebel Mobile Disconnected Applications

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1..

You can monitor synchronization sessions and synchronization conflicts for Siebel Mobile disconnected applications from a number of views within the Administration - Siebel Mobile screen. Every time a user synchronizes with the Siebel Server, a record is made. The following procedures relate to monitoring synchronization:

- "Monitoring Synchronization Sessions and Data Download" on page 4-19

- "Obtaining Error Details from Synchronization Sessions" on page 4-20

- "Obtaining Business Component Information from Synchronization Conflicts" on page 4-21

- "Obtaining an Audit Trail for Synchronization Sessions" on page 4-21

- "Responding to Synchronization Errors in Siebel Mobile Disconnected Applications" on page 4-21

Monitoring Synchronization Sessions and Data Download

The Session Administration view contains detailed information about user synchronization sessions by gathering together all data related to each synchronization session that a user performs. Use this view to monitor and investigate user synchronization activities in Siebel Mobile disconnected applications. In the Session Administration view, the Sync Status list appears above two child lists: Sync Sessions and Extraction Info.

- **Sync Status.** Enables you to monitor each user synchronization session, and includes information on synchronization status, date, type of synchronization, and so on.

- **Sync Sessions.** Enables you to gather further information on the status of each synchronization session, including information on any conflicts that occurred during the synchronization, the size of the data extracted, and so on.

- **Extraction Info.** Enables you to review a detailed description of all data extracted during the synchronization session, including business component information and the number of records extracted.

Monitoring Synchronization Sessions

The following procedure shows how to monitor synchronization sessions.

To monitor synchronization sessions

- Navigate to the Administration - Siebel Mobile screen, then the Session Administration view.

  The Sync Status list appears with the two child lists: Sync Sessions and Extraction Info.

Monitoring Data Download

The following procedure shows how to monitor data download.

To monitor data download

1. Navigate to the Administration - Siebel Mobile screen, then the Session Administration view.

   The Sync Status list appears with the two child lists: Sync Sessions and Extraction Info.

2. Scroll down to the Extraction Info list.

   There is one extraction record for each unique extraction context. Review the data-extraction information. The information recorded for review is described in the following table.

Field	Comments
Business Component	The business component on which the synchronization is based.
Context	The context of the extraction.
# Records Extracted	The number of records that exist in the context of the applied filters.
Extract Time	The length of time it took to extract the set of records.
Business Object Filter	The business object filter (if any) applied to the extraction.
Business Component Filter	The business component filter (if any) applied to the extraction.

Information in the Extraction Record

The extraction record lists the following information:

- The filters used to control the extraction

- The context of the extraction

- How many records exist in that context for those filters

- How long it took to extract that set of records.

  By analyzing these records and looking at all extraction changes resulting from the filter changes, or changes to the search specifications or both (defined in Siebel Tools), you can answer the following questions:

- Why did I download a particular record?

- Why is an expected server record not downloaded?

- Why is the total number of records showing up in some views so big?

- Why is the total number of records showing up in some views so small?

- Why does the extraction take so long?

> **Note:** Because storage space on a mobile device is typically limited and the available networking bandwidth for synchronization might not always be optimal, you must configure the filters carefully, and keep the size of your local database small. It is recommended that users have a local database size of about 3 megabytes (MB), which can be expanded up to 50 MB

Obtaining Error Details from Synchronization Sessions

The Conflict Administration view enables you to access selected transaction errors, and to obtain information about synchronization errors that occur during individual synchronization sessions. The following tabs are available from the Conflict Administration view:

- **Error Details.** Use this tab to obtain detailed information about specific data conflicts. You can also take a particular action on any given conflict.

  For more information, see the following procedure.

- **Business Components.** Use this tab to see the business component information associated with a particular data conflict.

  For more information, see "Obtaining Business Component Information from Synchronization Conflicts" on page 4-21.

- **Audit Trail.** Use this tab to obtain information about the action that is taken on a particular data conflict. The Audit Trail must first be enabled for the conflict data.

  For more information, see "Obtaining an Audit Trail for Synchronization Sessions" on page 4-21.

To obtain error details from the synchronization sessions

1. Navigate to the Administration - Siebel Mobile screen, then the Conflict Administration view.

2. In the Transactions list, select the appropriate record, and then click the Error Details tab.

3. In the Error Details list, select or query for the record that you want.

Obtaining Business Component Information from Synchronization Conflicts

The Transactions view on the Conflict Administration screen enables you to obtain business component information related to synchronization errors that occur during individual synchronization sessions.

To obtain business component error details

1. Navigate to the Administration - Siebel Mobile screen, then the Conflict Administration view.

   The Transactions list appears.

2. In the Transactions list, select the appropriate record, and then click the Business Components tab.

Obtaining an Audit Trail for Synchronization Sessions

The Transactions view on the Conflict Administration screen enables you to obtain audit-trail information for an action that was taken for a particular transaction. You must enable Audit Trail separately. For information about enabling Audit Trail, see *Siebel Applications Administration Guide*.

To obtain audit trail information for synchronization errors

1. Navigate to the Administration - Siebel Mobile screen, then the Conflict Administration view.

   The Transactions list appears.

2. In the Transactions list, select the appropriate record, and then click the Audit Trail tab.

Responding to Synchronization Errors in Siebel Mobile Disconnected Applications

When reviewing a synchronization error, you can respond to it in one of the following ways: you can ignore it, export it, or reapply it.

To respond to synchronization transaction errors

1. Navigate to the Administration - Siebel Mobile screen, then the Conflict Administration view.

   The Transactions list appears. The transaction buttons are described in the following table.

Action	Result
Reapply	Reapplies the selected transaction with the values listed in the view or Field Value view. These values override the results provided by the Siebel Server.
Export	Exports the content of the transaction in the same format used by the synchronization engine. For help with interpreting the content, create a service request (SR) on My Oracle Support. Alternatively, you can phone Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.
Ignore	Accepts the current status and does not act upon the error. The record becomes read-only. There is no impact, except that the error will no longer appear in queries for unresolved conflicts.

2. Click Reapply, Export, or Ignore, depending on your needs.

> **Note:** This step works only when the Siebel Application Object Manager is running on a Windows-based server.

Troubleshooting Synchronization Failures Due to Business Component Filters

If you are configuring synchronization for Siebel Mobile disconnected applications, a suggested practice is to start without any business component filters. The following procedure shows you how to troubleshoot business component filters.

To troubleshoot synchronization failures because of business component filters

1. Synchronize your mobile application, and if the synchronization fails because the data extraction is too big, then view the extraction results to find the business components that caused the problem.

2. If any business component extraction is too big, then reduce the size of the extraction by adjusting the existing search specifications.

Search specifications are specified in Siebel Tools or in the Siebel Mobile disconnected application settings and the selection filters. For more information, see "Developing Data Filters for Siebel Mobile Disconnected Applications" on page 5-1.

3. If neither of these solutions works, then use a business component filter to reduce the size of the result set of a particular business component.

For more information, see "Developing Data Filters for Siebel Mobile Disconnected Applications" on page 5-1.

5

Data Filtering for Siebel Mobile Disconnected Applications

This chapter describes how to develop data filters for your Siebel Mobile disconnected application. It includes the syntax for constructing business component filters, as well as some useful information on managing your filters. It includes the following topics:

- Developing Data Filters for Siebel Mobile Disconnected Applications
- Constructing Business Component Filters for Siebel Mobile Disconnected Applications
- Constructing Business Object Filters for Siebel Mobile Disconnected Applications
- Managing Filters for Siebel Mobile Disconnected Applications

Developing Data Filters for Siebel Mobile Disconnected Applications

The following general steps are recommended for developing synchronization filters for Siebel Mobile disconnected applications:

1. Identify the screens and views of your application. Then identify the business components that are required to support each screen and view, noting the areas where each business component occurs. For example, identify the form, list, or pick applets that are based on each business component.

2. Within Siebel Tools, establish the base parent-child relationships and any reverse relationships at the component level.

3. Review the business components that occur in picklists, and consider creating business component filters for those that will cause large numbers of records to synchronize with the mobile application. For each business component, determine whether it is possible to apply a search specification to all instances of the business component within the Siebel Mobile disconnected application. Develop a set of suitable business component filters in the Administration - Siebel Mobile, Application Administration view.

   Common examples of business components that are suitable for global business component filters include:

   - Employees (for large organizations)
   - Activities (for example, filter for current activities or activities of only certain kinds)
   - Accounts (for example, by geography)
   - Products (for example, active, or orderable products)

■ Orders (for example, open or closed in the last three months)

4. Create appropriate business object synchronization filters for each business object, and make sure that each business object includes a default filter. Default filters make sure that users avoid downloading too many records accidentally. Business object filters are created and maintained in the Administration - Siebel Mobile, Application Administration view.

Note: In a multilingual environment, default filters are created for the primary language only. If your environment is multilingual, then you must configure additional filters for each additional language that you want to run.

Constructing Business Component Filters for Siebel Mobile Disconnected Applications

Business component filters are used to restrict the size of extractions that otherwise might be too big. They suppress the extraction of business component records. Use business component filters with discretion because too much filtering can cause data-integrity problems on the server.

You can specify business component filters at either the application level or the user level. Do not specify business component filters at the user level outside of your test environment. After testing your business component filters, migrate them to the application level.

Information about the following is included in this topic:

■ "Example Syntax of Business Component Filter" on page 5-2

■ "Setting Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2

■ "Removing a Business Component Filter Setting" on page 5-4

■ "Configuring Business Component Filters for Pop-up Applets" on page 5-4

Example Syntax of Business Component Filter

Business component filters are used to limit the extraction of a business component for every context in which it is extracted. Business component filters use query by example (QBE) syntax:

```
[Status] = "Not Started" OR [Status] = "In Progress" OR ([Status] IS NULL) OR
[Status] = "On Hold" OR ([Status] = "Done" AND [Done] >= Today() - 7)
```

For more information about QBE syntax, see *Siebel Developer's Reference*. Example business component filters, specific to the Siebel Mobile application for Siebel Pharma, are shown in Table 5–1 and Table 5–2.

Setting Business Component Filters for Siebel Mobile Disconnected Applications

You use the Business Components Filters tab in the Administration - Siebel Mobile screen, Application Administration view to configure or change synchronization filter settings for business components. The following procedure shows you how to set a business component filter for Siebel Mobile disconnected applications. There is no naming convention for business component filters.

> **Note:** You can access the Administration - Siebel Mobile screen through either the Siebel Web Client or Siebel Mobile Web Client.

To set a business component filter

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Select the appropriate mobile application in the top applet, and then click the Business Components Filters tab.

3. The fields in the Business Components Filters view are described in the following table.

Field	Comments
Owner	Read only. Indicates the Siebel Mobile disconnected application to which the business component will be associated. For example: Siebel ePharma Mobile.
Business Component	Text box. Indicates the business component name.
Name	Text box. Indicates the business component filter name. For example: Filter 1.
Query	Text box. Indicates the syntax for the query, for example: `[Start Date] <=Today()`

4. In the Query field, define the filter for each business component as required.

5. To add a new business component filter, click New, and then enter the required information.

Table 5–1 shows some example business component filters for the Siebel Mobile application for Siebel Pharma, including the table to which the business component filter belongs, the filter specification, and whether the filter can be modified or not.

Table 5–1 Key Business Component Filters for the Siebel Mobile Application for Siebel Pharma

Business Component	Table	Filter Description	Filter Specification	Enabled
Pharma Professional Call - Mobile	S_EVT_ACT	My Calls scheduled within the last (plus or minus) 7 Days.	([Start Date] > Today() - 8) AND ([Start Date] < Today() + 8) AND EXISTS [Owned By Id]= LoginId()	Yes
Contact	S_CONTACT	DOCK_FLG='Y' is the Dock Flag to be set for all Contacts who are part of My Calls in the last (plus or minus) days.	[My Position Id] = PositionId() AND [Dock Flag]='Y'	Yes
Account	S_ORG_EXT	My Accounts	([My Position Id] = PositionId ())	Yes
Account	S_ORG_EXT	My active accounts of type Hospital.	([Account Status]=LookupValue("ACCOUNT_STATUS","Active") AND [My Position Id] = PositionId() AND [Type] = LookupValue("ACCOUNT_TYPE","Hospital"))	Yes

Table 5–2 shows some example business component filters that drive picklists for the Siebel Mobile application for Siebel Pharma.

Table 5–2   Business Component Filters that Drive Picklists for the Siebel Mobile Application for Siebel Pharma

Business Component	Table	Filter Description	Filter Specification
Pharma Professional - Primary Speciality	S_MED_SPEC	Filter all specialities in My Organization.	(EXISTS [XYZ Organization Id] = OrganizationId())
CUT Address - CE	S_ADDR_PER	Filter addresses linked to My Contacts or My Accounts.	(EXISTS ([Account Position Id]=PositionId())) OR (EXISTS ([Contact Position Id]=PositionId()))
Pharma Address Inter Table - CE	S_CON_ADDR	Filter addresses linked to Contacts.	[Professional Position Id] = PositionId() AND [Dock Flag]='Y'
Pharma Internal Product (Brands)	S_PROD_INT	Filter the products owned by the user.	[Owned By Id] = LoginId()
LS Pharma My Products List	S_EMP_ PRDINT	Filter the products allocated to the user.	[Owned By Id] = LoginId() AND ([Alloc Start Date] <= Today() AND ([Alloc End Date] IS NULL OR [Alloc End Date] >= Today()))
LS Pharma My Sample Lots List	S_EMP_ PRDINT	Filter the samples allocated to the user.	[Owned By Id] = LoginId() AND ([Alloc Start Date] <= Today() AND ([Alloc End Date] IS NULL OR [Alloc End Date] >= Today()))
LS Pharma My Promotional Items List	S_EMP_ PRDINT	Filter the promotional items allocated to the user.	[Owned By Id] = LoginId() AND ([Alloc Start Date] <= Today() AND ([Alloc End Date] IS NULL OR [Alloc End Date] >= Today()))
List Of Values	S_LST_OF_VAL	Filter the list of values.	None.
Picklist Generic	S_LST_OF_VAL	Filter the list of values.	None.

Removing a Business Component Filter Setting

The following procedure shows you how to remove a business component filter setting.

To remove a business component filter setting

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Select the appropriate mobile application in the top applet, and then click the Business Component Filters tab.

3. Select the filter setting record that you want to remove.

4. From the Business Component Filters menu, choose Delete Record.

Configuring Business Component Filters for Pop-up Applets

For business components that are related to pop-up applets, such as picklists and associated applets, you can prevent potentially large volumes of records from being downloaded by applying an additional filter condition called PopupSearch to the data extraction for the business component. If you do not use PopupSearch to filter the data extraction for business components that are related to pop-up applets, then all records are downloaded without any filter. The PopupSearch filter condition is applied on top of any other filters that are also specified for the business component.

Business Component Filter Syntax for Pop-up Applets

The syntax for configuring filters for pop-up applets is as follows:

```
PopupSearch(<searchspec>)
```

The business component filters shown in Table 5–3 include the PopupSearch condition. When you use the PopupSearch condition to filter the data extraction for business object components, only records that satisfy the condition are downloaded.

Related Topic

"About Filter Application During Chained Data Extraction" on page 5-11

Table 5–3   Example Business Component Filters for Pop-up Applets

Application	Business Component	Name	Query
Siebel Mobile application for Siebel Pharma	Contact	ContactFilter	([My Position Id] = PositionId ()) PopupSearch([Dock Type] = "Y")
Siebel Mobile application for Siebel Pharma	Contact	ContactFilter	PopupSearch([Dock Type] = "Y")

Constructing Business Object Filters for Siebel Mobile Disconnected Applications

Business object filters are applied to a specified business object, and they can contain search and sort specifications for business components that are part of the business object.

There must be a default filter for each business object name. Default filters make sure that users avoid downloading too many records accidentally. It is not recommended that you set more than one filter as the default for a business object.

You can specify business object filters at either the application level or the user level, but not at the component level. Business object filters specified at the user level override a filter specified at the application level, provided the application-level filter has the identical values for the business object name and filter name. The list of filter options presented to the user is the merged list of all application filters except those overridden at the user level, plus all user filters.

Information about the following is included in this topic:

- "Example Syntax of Business Component Filter" on page 5-2
- "Setting Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2
- "Removing a Business Component Filter Setting" on page 5-4
- "Business Object Filter Chaining" on page 5-7
- "Overview of Filtering Options" on page 5-8
- "Example Business Object Filters" on page 5-9
- "Example Business Object Filters With Chained Data Extraction" on page 5-9
- "About Filter Application During Chained Data Extraction" on page 5-11

Example Syntax of Business Object Filter

Business object filters use the following predefined query (PDQ) syntax:

```
'Account'.Search = "[State] = LookupValue ( ""STATE_ABBREV"", ""CA"" )"
'Account'.Sort = "Name, Location"
```

where:

- Account is the business component name.

- Search is the key word.

- "[State] = LookupValue (""STATE_ABBREV"", ""CA"")" is the search specification where:

  - State is the field name.

  - LookupValue is the function for find and the LOV value.

  - STATE_ABBREV is the LOV type.

  - CA is the LOV value.

- 'Account'.Sort = "Name, Location" is the sort specification for sorting the returned list.

> **Note:** The normal syntax applies for search and sort specifications. However, quotes must be escaped using double quotes in the search specification because the search specification itself is enclosed in double quotes.

PDQ syntax rules are as follows:

- The business component name must be a valid business component in the business object on which the PDQ is based.

- Search and Sort can be specified for all active buscomps in the business object on which the view is based, appended to each other in any order using space as delimiter.

For more information about PDQ syntax, see *Siebel Developer's Reference*.

Setting Business Object Filters for Siebel Mobile Disconnected Applications

You use the Business Objects Filters tab in the Administration - Siebel Mobile, Application Administration view to define business object level filters, which restrict data that is downloaded to the Siebel Mobile client upon synchronization. The following procedure shows you how to set a business object filter for Siebel Mobile. There is no naming convention for business object filters.

To set a business object filter

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Select the appropriate mobile application in the top applet, and then click the Business Object Filters tab.

   The fields in the Business Object Filters view are described in the following table.

Field	Comments
Owner	Read only. Indicates the Siebel Mobile application to which the business object will be associated. For example: Siebel ePharma Mobile.
Default	Indicates what filter to use by default if a user does not make a selection. Be sure to define a default filter for each business object in Siebel Mobile. If no filters are applied during the synchronization process, then an unacceptably high volume of data will be downloaded to the mobile device.
Business Object	Text box. Indicates the business object name.
Name	Text box. Indicates the business object filter name. For example: Filter 1.
Query	Text box. Indicates the syntax for the query, for example: `'Account'.Search = "[Account Status] = LookupValue (""ACCOUNT_ STATUS"", ""Active"" )" 'Account'.Sort = "Name, Location"`

3. In the Query field, define the filter for each business object as required.

4. To add a new business object filter, click New, and then enter the required information.

Removing a Business Object Filter Setting

The following procedure shows you how to remove a business object filter setting.

To remove a business object filter setting

1. Navigate to the Administration - Siebel Mobile screen, then the Application Administration view.

2. Select the appropriate mobile application in the top applet, and then click the Business Object Filters tab.

3. Select the filter setting record that you want to remove.

4. From the Business Object Filters menu, choose Delete Record.

Business Object Filter Chaining

Business object filter chaining refers to the process of downloading a business objects's dependent or child business component records (buscomps), as defined by the business object filter. To ensure that you download all the dependent or child business component records for a business object, you must enhance the business object filter by adding extra parameters to it for chained data extraction.

Syntax for Business Object Filter Chaining

The syntax for configuring chained data extraction for business object filters is as follows:

```
AddSearch((<SourceLocation1>,< DestinationLocation 1>),(<SourceLocation2>,<
DestinatinLocation 2>),. . . )
```

where:

- <SourceLocation> can be specified in one of the following ways:
- <BCName>.<FieldName>

  <BCName> is the name of the business component (Buscomp) in the source business object. That is, the business object in which this configuration is added.

<FieldName> is the field name in the business component whose value will be mapped to the records in the destination.

- <BCName>

  The field from the source business component, which is mapped to the records in the destination business component, is "Id" by default.

- <DestinationLocation> can be specified in the following ways:

- <DestinationBOFilterName>.<BCName>.<FieldName>

  Here <DestinationBOFilterName> refers to the filter name of the destination business object, <BCName> is the business component name in the destination business object, and <FieldName> is the field in that business component which has to match the source business component's field value.

- <DestinationBOFilterName>.<BCName>

  The field from the source business component, which is mapped to records in the destination business component, is "Id" by default.

- <BCName>

  If only the business component name is specified, then the records from the source will be mapped to the Id value of the business component, as specified by the source business object.

Overview of Filtering Options

Before starting to configure business object filters for Siebel Mobile, note that the following filtering options are available:

- **Business Object Filters.** You can configure different business object filters for different views in Siebel Mobile as shown in "Example Business Object Filters" on page 5-9. Business object filters have the following limitations:

  - Dependent business component records are not downloaded as part of business object filters.

  - Business object filters do not apply to pop-up applets.

- **Business Object Filter Chaining.** To ensure that all dependent business component records are downloaded for a business object, you can configure business object filters with business object chaining as shown in "Example Business Object Filters With Chained Data Extraction" on page 5-9.

- **Filters for Pop-up Applets.** To restrict the data downloaded in a pop-up applet, you can use the PopupSearch filter condition to filter the data extraction as shown in the example in "Configuring Business Component Filters for Pop-up Applets" on page 5-4. If a filter is specified for a business component at both the business component and business object level, then you can use the IncludeInBOIterations keyword in your query to specify to apply the business object filter, otherwise neither filter condition will be applied. For more information, see the example in "About Filter Application During Chained Data Extraction" on page 5-11.

Example Business Object Filters

The example business object filters in Table 5–4 are explained as follows:

- **Pharma Professional Call - Mobile business object filter.** Download all Calls along with their child business component records (including the products detailed, promotional items, and samples disbursed records) which fall within the date range plus or minus 5 days from today.

- **Contact business object filter.** Download all My Contacts along with their child business component records, including the calls within the date range plus or minus 10 days from today.

- **Account business object filter.** Download all My Accounts of type Hospital along with the calls for those accounts within the date range plus or minus 10 days from today, and other child objects.

Table 5–4   Example Business Object Filters

Default	Business Object	Name	Query
Yes	Pharma Professional Call - Mobile	PH1	'Pharma Professional Call - Mobile'.Search = "(([Start Date] >= Today() - 5) AND ([Start Date] <= Today() + 5))"
Yes	Contact	PH2	'Contact'.Search = "[My Position Id] = PositionId()" 'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() - 10) AND ([Start Date] <= Today() + 10)"
Yes	Account	PH3	'Account'.Search = "[Type] = LookupValue (""ACCOUNT_ TYPE"", ""Hospital"") AND [My Position Id] = PositionId()" 'Pharma Professional Call - Mobile'.Search = "(([Start Date] >= Today() - 10) AND ([Start Date] <= Today() + 10))"

The business object filters in Table 5–4 do not include chained data extraction and, as a result, have the following limitations:

- If you want to see the call details (products detailed, promotional items, and samples disbursed records) for all Contact calls, then you will be unable to do so. For example, you will be unable to see the call details for Contact calls where the date is greater than 5 days but less than 10 days.

- If there is an account of type Pharmacy (not of type Hospital) to which a call is scheduled within the date range plus or minus 5 days from today, then even though the call is visible in the Calls list, you will be unable to review the account details for the call because the record was not downloaded as part of the account business object. Only account records of type Hospital were downloaded.

Example Business Object Filters With Chained Data Extraction

To ensure that all relevant and dependent data is downloaded and available to users in offline mode, you must enhance the example business object filters in Table 5–4 by adding additional parameters for chained data extraction. In Table 5–5, the additional parameters added for chained data extraction are highlighted in bold. Note the following:

- The business object filter PH1 in Table 5–5 is the enhanced version of PH1 in Table 5–4.

- The business object filter PH2 in Table 5–5 is the enhanced version of PH2 in Table 5–4.

- The business object filter PH3 in Table 5–5 is the enhanced version of PH3 in Table 5–4.

Table 5–5   Example Business Object Filters with Chained Data Extraction

Default	Business Object	Name	Query
Yes	Pharma Professional Call - Mobile	PH1	'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() - 5) AND ([Start Date] <= Today() + 5)" AddSearch(("Pharma Professional Call - Mobile.Contact Id","PH2.Contact"),("Pharma Professional Call - Mobile.Account Id","PH3.Account"))
Yes	Contact	PH2	'Contact'.Search = "[My Position Id] = PositionId()" 'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() - 10) AND ([Start Date] <= Today() + 10)" AddSearch(("Pharma Professional Call - Mobile","PH1.Pharma Professional Call - Mobile"))
Yes	Account	PH3	'Account'.Search = "[Type] = LookupValue (""ACCOUNT_TYPE"", ""Hospital"") AND [My Position Id] = PositionId()" 'Pharma Professional Call - Mobile'.Search = "([Start Date] >= Today() -10) AND ([Start Date] <= Today() + 10)" AddSearch(("Pharma Professional Call - Mobile","PH1.Pharma Professional Call - Mobile"),("Contact","PH2.Contact"),("Affiliated Account.Party Id","Account"))

In Table 5–5, the example business object filters with chained data extraction are explained as follows:

- **Pharma Professional Call - Mobile business object filter.** Specifies to download:

  – All Contact business component records and their children in the Contact business object whose Id matches the Contact Id of the Pharma Professional Call - Mobile buscomp, which was downloaded as part of the Pharma Professional Call - Mobile business object.

  – All Account business component records and their children in the Account business object whose Id matches the Account Id of the Pharma Professional Call - Mobile buscomp, which was downloaded as part of the Pharma Professional Call - Mobile business object.

- **Contact business object filter.** Specifies to download all Pharma Professional Call - Mobile records and their children in the Pharma Professional Call - Mobile business object whose Id matches the Id of the Pharma Professional Call - Mobile buscomp, which was downloaded as a child of the Contact business component in the Contact business object.

- **Account business object filter.** Specifies to download:

  – All Pharma Professional Call - Mobile records and their children in the Pharma Professional Call - Mobile business object whose Id matches the Id of the Pharma Professional Call - Mobile buscomp, which was downloaded as a child of the Account business component in the Account business object.

  – All Contact records and their children whose Id matches the Id of the child Contacts, which were downloaded as part of the Account business object.

  – All the child records of the Accounts which are affiliated to the downloaded Accounts.

About Filter Application During Chained Data Extraction

If there is a filter specified for a business component at both the business component filter level and the business object filter level, then neither filter conditions are applied to the records being downloaded during a chained data extraction. During a chained data extraction, all flat business component and business object filters that are configured for a business component are not applied by default. To override this, you must use the IncludeInBOIterations keyword set to Y in your query, which specifies to apply the business object filter, as shown in the example in Table 5–6.

Table 5–6   Example Business Component Filter During Chained Data Extraction

Application	Business Component	Name	Query
Siebel Mobile application for Siebel Pharma	Contact	ContactFilter	[My Position Id] = PositionId () PopupSearch([Dock Type] = "Y") IncludeInBOIterations = 'Y'

Related Topic

"Configuring Business Component Filters for Pop-up Applets" on page 5-4

Managing Filters for Siebel Mobile Disconnected Applications

The following topics describe how to create and manage filters:

- "Server Synchronization Deployments" on page 5-11

- "Examples of Default Business Object Declarations" on page 5-12

- "When to Use Default Business Object Declarations" on page 5-12

- "Determining the Correct Visibility" on page 5-13

- "Overriding the Popup Visibility Type" on page 5-13

- "About Multiple Visibility Methods" on page 5-14

- "About Visibility on the Siebel Mobile Client" on page 5-14

Server Synchronization Deployments

For server synchronization deployments, administrators can create business object and business component filters. Both application-level and user-level filters can be used in this deployment. The application-level filters are managed in the Administration - Siebel Mobile, Application Administration view. The user-level filters are managed in the Administration - Mobile, User Administration view. Changes to any filters will be effective on your next synchronization session, without having to restart the Siebel Application Object Manager's synchronization component for the mobile application. Filters are available to all users. Therefore, define the filters with the needs of all users in mind. For more information about creating filters, see

- "Constructing Business Component Filters for Siebel Mobile Disconnected Applications" on page 5-2

- "Constructing Business Object Filters for Siebel Mobile Disconnected Applications."

Examples of Default Business Object Declarations

You can configure the extraction of business components from business objects, which are not exposed as part of an applet. You set default business object declarations under Settings in the Administration - Siebel Mobile, Application Administration view as described in the following examples.

Example 5–1   Default Business Object Declaration

The following example of a default business object declaration extracts the Action and Action Employee business components where they occur with the visibility set to zero (0) by using the filter indicated:

```
Action|0||Action||Action Employee|
```

Business object filters are generally used only for extracting business components that do not correspond to any views or applets. Business object declarations identify specific business components within the business object to be extracted. Business object filters normally give a query that is based on the primary business component in the business object. They force the extraction of any business components mentioned in the query when there is no corresponding applet within the application that can cause the extraction to occur.

Example 5–2   Default Business Object Declaration

In the following example, the declaration is used to extract all the Price List Line Items under the Order Entry (Sales) business object.

```
DefaultBusObjs13=  Order Entry (Sales)|0||Price List Item|
```

This declaration does not have an associated QBE clause. When this is the case, all of the records available to the user for the given visibility are extracted.

> **Note:**   Be careful when modifying a default business object setting for pick applets, and do so only with the support of a skilled configurator of Siebel Business Applications.

When to Use Default Business Object Declarations

Use default business object declarations to force the extraction of data for a given business component in the context of a given business object and Visibility type. The default business object extractions are performed in the first phase of data extraction. For more information about visibility designations, see "Determining the Correct Visibility" on page 5-13.

You use these declarations most often to extract additional data that is not extracted as part of the user-interface extraction. This feature can be useful for business components that are referenced programmatically by other business components but are not exposed in the user interface. The default business object declarations are used to force the extraction of a subset of data to the mobile application that might not have been otherwise extracted or, most commonly, to filter the data downloaded for dynamic picklists or pick applets.

All pick data is not downloaded to the mobile application because of the memory constraints on the device. Only pick data for fields that are editable is downloaded. Therefore, if you are doing a query on a pick field, then you might not be able to display the picklist. If a pick field is read-only when viewing a record in an applet, then its pick button is disabled.

Determining the Correct Visibility

You must use the correct visibility designation in the default business object declarations. The visibility code entered must be the visibility that governs the data displayed for the business component within the context of the business object specified in the declaration. For example, the visibility code 3 corresponds to All Visibility, which is the visibility that applies to the Account business component when it is used in a pick applet.

To determine the correct visibility

1. Log in to Siebel Tools.

2. Examine the view and business component properties, and do the following:

    a. When creating a default business object declaration to restrict the volume of data extracted for a pick applet, begin by examining the Popup Visibility field in Business Component Properties.

    b. Cross-reference the visibility type with the visibility code in Table 5–7, and enter the appropriate visibility code in the declaration.

    If the Popup Visibility type for the business component is null, then the default value is All.

Table 5–7 summarizes the Popup Visibility types and the corresponding visibility codes.

Table 5–7   Popup Visibility Types and Codes

Popup Visibility Type	Visibility Code
Sales Representative	0
Manager	1
Personal	2
All	3
None	4
Organization	5
Contact	6

Note: Do not use the Group, Catalog, or Sub Organization Popup Visibility types. These visibility types are not supported in the Siebel Mobile disconnected application.

Overriding the Popup Visibility Type

If the Popup Visibility type is not sufficiently restrictive (for example, All Visibility), then this setting can lead to a large number of records being extracted when the picklist is processed during synchronization. Making the pop-up visibility more restrictive reduces the number of records extracted for picklists. The OverridePopupVisibility user property for an applet overrides the Popup Visibility type on a business component. Use this property when the visibility that you want differs from the business component's Popup Visibility type, and you do not want to change the Popup Visibility type. If several picklists use the same business component, then you can also use the OverridePopupVisibility user property to vary the visibility of the picklists in the different applets.

Restrictions That Apply When Several Applications Share the Same Repository

Consider the following restrictions if multiple applications are sharing the same repository:

- Changing the Popup Visibility type has a global effect on all instances where the business component is used. If multiple applications share the same repository and use the same business components, then changing the Popup Visibility type for a common business component might have an undesirable effect on another application.

- If multiple applications share the same applet, then the picklist in each applet shares the same visibility as defined by the OverridePopupVisibility property. This is because the OverridePopupVisibility property is set on the containing applet.

To override the pop-up visibility

- In Siebel Tools, navigate to Applet, then Applet User Properties, and define the OverridePopupVisibility user property on the applet containing the control that opens the pick applet.

  If OverridePopupVisibility is used, then the picklist and pick applet search specifications are ignored during the synchronization when the records for the picklist are extracted.

  It is recommended that you use the condition filter PopUpSearch as described in "Configuring Business Component Filters for Pop-up Applets" on page 5-4 to restrict data download rather than the OverridePopupVisibility user property.

About Multiple Visibility Methods

When a record is extracted by using different visibilities, the record is tagged with each visibility. For example, if an individual contact record is extracted under Org visibility, and if the same contact record is extracted later under Salesrep visibility, then the visibility field on the record contains a bitmask indicating that the two visibilities apply to this record. The synchronization of mobile applications extracts data in the following order:

1. DefaultBusObjs

2. Views

3. PickList

About Visibility on the Siebel Mobile Client

Each record downloaded to the Siebel Mobile client is sampled with a visibility number. The visibility number is used to determine which views the record must display. The visibilities supported and the corresponding visibility codes are shown in Table 5–7.

> **Note:** Group, Catalog, or Sub Organization visibility are not supported. For each BC Table in the local storage, there is a column called _PdaVisibilityTypes which holds the visibility information. The value in this field is calculated using the following formula: The sum of the power of 2 to the n, where n is the visibility code indicating the visibility of the record. For example, if a record is configured with the Sales Representative and All visibility types, then the value in the _PdaVisibilityTypes field would be $(2^0 + 2^3) = (1+8) = 9$.

6

Deploying Siebel Mobile Disconnected Applications

This chapter describes how to deploy a Siebel Mobile disconnected application, and it includes information about server topology, hardware, network configuration, server installation, and performance and scalability. It includes the following topics:

- Overview of Deployment for the Siebel Mobile Disconnected Application Client
- Installing Siebel Server for Siebel Mobile Disconnected Application Synchronization
- Configuring Siebel Server for Siebel Mobile Disconnected Application Synchronization
- Roadmap for Configuring Incremental Synchronization for Siebel Mobile

Overview of Deployment for the Siebel Mobile Disconnected Application Client

This topic provides an overview of important factors to consider when configuring Siebel Server for Siebel Mobile disconnected application synchronization. When planning and executing the deployment of a mobile application using server synchronization, you must understand the hardware and network requirements. While these factors are generally applicable to all deployments, there are unique aspects to each customer configuration and implementation. Therefore, it is recommended that customers conduct detailed configuration, sizing, and production-readiness reviews. For help with detailed configuration, sizing, and production readiness reviews, contact your Oracle sales representative for Oracle Advanced Customer Services to request assistance from Oracle's Application Expert Services. This is especially important for complex deployments, such as those supporting large numbers of users over wide, geographic areas.

You can also improve the performance and scalability of server synchronization deployments by working with the parameters of the Siebel application server component. For more information about the Siebel application server, see "Optimizing Siebel Server Process Management for Siebel Mobile Disconnected Application Synchronization" on page 6-6.

> **Note:** The recommendations in this chapter are general ones and are intended to raise your awareness of the key factors in Siebel Mobile disconnected application synchronization, performance, and scalability. These factors must be confirmed in your environment, and the usage patterns in your enterprise must be considered.

Overview of Siebel Server Topology

"Server and Components" on page 6-2 shows the servers and components that are required to deploy server synchronization for a mobile application. The components are as follows:

- Siebel Mobile disconnected application database

- Siebel Server

- Siebel Web engine

- Siebel Mobile disconnected application

The synchronization components are as follows:

- Synchronization engine for the Siebel Mobile disconnected application, which resides on Siebel Server.

- Siebel Mobile disconnected Synchronization Client, which resides on the Siebel Mobile disconnected application.

Figure 6–1   Server and Components
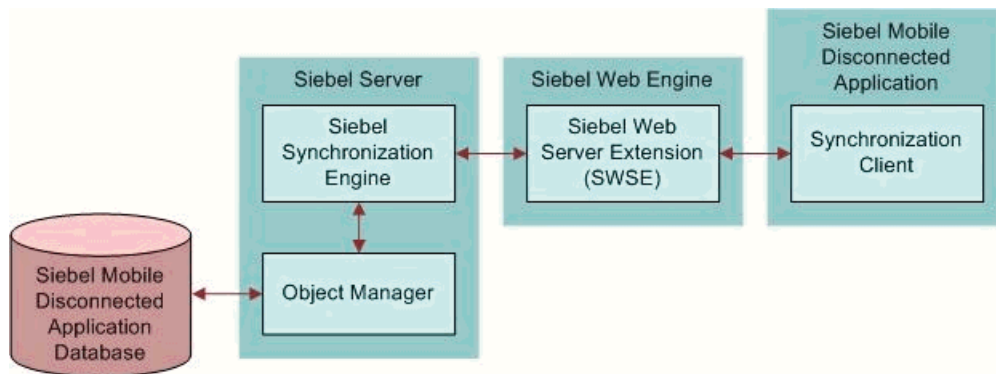
Recommended Hardware and Network Configuration

The critical factor in sizing the implementation of a Siebel Mobile disconnected application is the expected, peak-synchronization load. When calculating this load, consider the following specific, mobile-application variables. You must consider these variables within the context of the hardware specifications, including memory and processor speed:

- Number of concurrent users

- Number of transactions

- Size of the data file

The following resources are available as you plan the implementation of your Siebel Mobile disconnected application:

- Refer to Microsoft and manufacturer documentation for comprehensive information on server hardware and registry parameters.

- For assistance with hardware planning and network implementations for mobile applications, contact your Oracle sales representative for Oracle Advanced Customer Services to request assistance from Oracle's Application Expert Services.

Installing Siebel Server for Siebel Mobile Disconnected Application Synchronization

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1. The components that are required for Siebel Mobile disconnected applications are installed when you install the Siebel Server. This topic includes the following information:

- "Installing the Components for Siebel Mobile Disconnected Application Synchronization Using the Siebel Server Installer" on page 6-3

- "Siebel Server Component Parameters for Siebel Mobile Disconnected Application Synchronization" on page 6-4

- Add the remote installation for Siebel Mobile disconnected applications

  For information about enabling the component groups for Siebel Mobile, see "Enabling the Handheld Component Groups for Siebel Mobile Disconnected Applications" on page 3-8 and "Setting Up the Disconnected Mobile Synchronization Component Group" on page 3-8.

For information about installing and configuring Siebel Server, see *Siebel Installation Guide for the operating system you are using* for the operating system you are using.

Installing the Components for Siebel Mobile Disconnected Application Synchronization Using the Siebel Server Installer

Install the Siebel Server, following the instructions in the Siebel Server installation guide for the operating system you are using. When you reach the Setup Type screen in the Installer wizard, you are presented with three installation options:

- **Typical.** This setup option installs all Siebel Server components.

- **Compact.** This setup option installs only those components necessary to run the Siebel Server but no additional components or help.

- **Custom.** This setup option lets you customize your installation by choosing the specific components that you want to install.

To install the components for Siebel Mobile disconnected application synchronization with your Siebel Server installation

1. During the Siebel Server installation, when the Setup Type screen appears, choose the Custom setting, and then click Next.

   Note: At this screen, you can also choose a different directory for your Siebel Server installation.

   ---

2. From the following components, choose Handheld Synchronization:

- Siebel Application Object Manager Component

- Handheld Synchronization

- Siebel Data Quality Connector

- Remote Search Support

- Siebel Java Integrator

3. Click Next.

Continue with the installation in the *Siebel Installation Guide for the operating system you are using*. The installation wizard automatically installs and configures the components for server synchronization.

Siebel Server Component Parameters for Siebel Mobile Disconnected Application Synchronization

Some common mobile applications, such as Siebel Pharma, are preconfigured by default. If you want to configure additional applications, see "Configuring Siebel Server for Siebel Mobile Disconnected Application Synchronization" on page 6-4 for more information. You must add the synchronization server components that you installed and configured to reflect your company's environment. See Table 6–1 for a list of the required parameters. For information on adding server components for server synchronization, see *Siebel System Administration Guide*.

Table 6–1   Siebel Server Component Parameters for Server Synchronization

Parameter	Default Value	Description
ApplicationName	This value can be, for example, the following: Siebel ePharma Mobile.	The Siebel Mobile disconnected application. This value must match the name of the mobile application as it is specified in Siebel Tools.
ApplicationTitle	This value can be, for example, the following: Siebel ePharma Mobile.	The name of the Siebel Mobile disconnected application as shown on the title bar on the browser. This parameter is used only if the Siebel application developed for the mobile application is running on the Siebel Mobile Web Client.
ApplicationSplashText	This value can be, for example, the following: Siebel ePharma Mobile.	The Siebel Mobile disconnected application name as shown on the splash screen. This parameter is used only if the application developed (in Siebel Tools) for the Siebel Mobile disconnected application is running on the Siebel Mobile Web Client.

Configuring Siebel Server for Siebel Mobile Disconnected Application Synchronization

This task is a step in "Roadmap for Setting Up Siebel Mobile Disconnected Applications" on page 3-1. The Siebel Server installer copies the necessary DLLs to create a Siebel Application Object Manager for enabling server synchronization for Siebel Mobile disconnected applications. It also creates and configures a server component and component group. This topic describes which options you must select

to install the software correctly, along with creating or configuring additional Siebel Application Object Managers. This topic includes the following information:

- "Configuring Logging Levels for Siebel Mobile Disconnected Application Synchronization" on page 6-5

- "Optimizing Siebel Server Process Management for Siebel Mobile Disconnected Application Synchronization" on page 6-6

- "Roadmap for Configuring Incremental Synchronization for Siebel Mobile" on page 6-6

Configuring Logging Levels for Siebel Mobile Disconnected Application Synchronization

To set the logging level, you must perform the following tasks:

- "Configuring Siebel Server Logging Using the Server Manager" on page 6-5

- "Configuring Siebel Server Logging Using the Server Configuration Screen" on page 6-5

You set the logging level to a value between 1 and 5 as shown in Table 6–2.

Table 6–2   Logging Levels for Siebel Mobile Disconnected Application Synchronization

Logging Level	Results
1	Error listing
2	Warning listing
3	Information listing, including SQL tracing
4	Information listing
5	Debug information

Configuring Siebel Server Logging Using the Server Manager

The following procedure shows you how to configure Siebel Server logging levels using the Server Manager.

To configure Siebel Server logging levels

1. Log in to the command Server Manager from a prompt.

2. Run the following command:

```
change evtloglvl HandheldSyncLog=[LogLevel] for comp [OMName],
where [LogLevel] = an integer between 1 - 5   /*(5 enables all logging)*/
and [OMName] = the OM name   /*(for example,<ApplicationName>ePharmaMObjMgr_
enu)*/
```

Configuring Siebel Server Logging Using the Server Configuration Screen

The following procedure shows you how to configure Siebel Server logging levels using the Server Configuration screen.

To configure Siebel Server logging using the Server Configuration screen

1. Navigate to Administration - Server Configuration screen, then the Servers view.

2. Select the appropriate Siebel Server in the top applet.

3. In the Components applet, query for the appropriate component.

For example: Handheld Sales CE (ENU)).

4. Select the Events tab and then do the following:

    a. Query for the event type, Handheld Sync Logging.

    b. Set the value to a number between 1-5, and then save the change.

    See Table 6–2 for the logging-level results.

Optimizing Siebel Server Process Management for Siebel Mobile Disconnected Application Synchronization

Several parameters help to optimize Siebel Server processing for Siebel Mobile disconnected application synchronization.

To set parameters to optimize Siebel Server process management

1. Log in to the Siebel application as a user with administrator privileges.

2. Navigate to the Administration - Server Configuration screen, then the Servers view.

3. Select the appropriate Siebel Server in the top applet.

4. In the Components applet, query for the appropriate component.

   For example: ePharmaMObjMgr_enu.

5. Select the Parameters tab and then update the parameters as described in the following table.

Parameter	Description
Max Tasks	Determines the maximum number of threads that can run concurrently for a given component. Set the value of this parameter to a number equal to that of the expected peak number of concurrent synchronizations for each Siebel Server.
Min MT Servers	Determines how many multithreaded server processes are started by default for the Siebel Application Object Manager.
Max MT Servers	Defines the maximum number of processes supported by the instance of Siebel Application Object Manager. The value for this parameter must be the same as the Min MT Servers parameter. Set it so that the threads for each process (Max Tasks and Max MT Servers) are optimized.

Roadmap for Configuring Incremental Synchronization for Siebel Mobile

To configure incremental synchronization for Siebel Mobile disconnected applications, perform the following tasks:

1. "Enabling Incremental Synchronization for Siebel Mobile Disconnected Applications" on page 4-15

2. "Configuring the Object Mappings for a New Business Component" on page 6-7

3. "Enabling Modification Tracking for Siebel Mobile Disconnected Application Clients" on page 6-7

Configuring the Object Mappings for a New Business Component

The following procedure shows you how to configure the object mappings for a new or customized business component.

To configure the object mappings for a new business component

1. Log in to Siebel Tools and do the following:

   a. Locate the new business component that you want and its corresponding base table name, and make a note of the object mappings in the table.

   b. If the new business component is a child that has a many-to-many relationship with its parent business component, then locate the corresponding parent business object and make a note of the intersection table name.

   c. If the new business component contains a picklist business component, which does not exist in the object mapping table, then locate the corresponding picklist business object and make a note of the table name.

2. Log in to your Siebel business application, and configure the object mappings as follows:

   a. Navigate to the Administration - Siebel Mobile screen, Application Administration, and then the Object Definition view.

   b. Select the appropriate mobile application in the top applet.

   c. Add all the required business component-to-table object mappings as follows:

      – Click New to add each new entry.

      – Set Table to the table name.

      – Set Business Component to the business component name.

      For example, to map Account to the S_PARTY table, set Business Component to Account and set Table to S_PARTY, and so on.

   d. If required, configure the intersection table mappings as shown in Step c.

      For all intersection table mappings, note that the business component name and the table name must be the same. So if the name of the intersection table is S_CON_ADDR, then click New to add a new entry, and set Table to S_CON_ADDR and set Business Component to S_CON_ADDR.

   e. If required, configure the picklist table mappings as shown in Step c.

3. Click the Settings tab, and set the Purge Interval to 30 if not already done so.

Enabling Modification Tracking for Siebel Mobile Disconnected Application Clients

Use the following procedure to enable modification tracking for Siebel Mobile disconnected application clients.

To enable modification tracking for Siebel Mobile disconnected application clients

1. Log in to the Siebel application as a user with administrator privileges.

2. Navigate to the Administration - Siebel Mobile screen, then the Mobile Clients view.

3. Locate and select the mobile client that you want from the Mobile Clients list, then complete the following field:

   Mobile Application Name. Select the appropriate mobile application for this node.

For information about how to configure a new client, see "Configuring the Mobile Node for Siebel Mobile Disconnected Application Users" on page 3-15.

4. Run database extract (dbxtract) for this mobile client, and then restart txnproc and txnroute.

After dbxtract is run, a full data and metadata download is enforced on the mobile client by Siebel Mobile when the mobile client next sends a synchronization request to the Siebel Server.

For information about how to run database extract, see "Running Database Extract for Siebel Mobile Disconnected Application Users" on page 3-16.

Note: If you remove a mobile application from the Mobile Application Name field in the Mobile Clients view and then add either the same or a new mobile application, then Siebel Mobile enforces a full data and metadata download on all corresponding mobile clients (or mobile application users) who are configured to use the mobile application, when the mobile clients next send a synchronization request to the Siebel Server. Removing a mobile application from the Mobile Clients view terminates the relationship between the mobile application and the mobile clients, and renders the application repository objects invalid. Adding a mobile application, regardless of whether the application was previously added or whether the application is new, creates a new relationship between the mobile application and the mobile clients. Hence a full data and metadata download is required.

7

Handling Synchronization Conflicts and Insert-Transaction Failures

This chapter outlines how to handle synchronization conflicts, insert-transaction failures, and recovery for Siebel Mobile disconnected applications. It includes the following topics:

- Preventing Synchronization Transaction Conflicts in Siebel Mobile
- Resolving Conflicts and Recovering Error Data in Siebel Mobile

Preventing Synchronization Transaction Conflicts in Siebel Mobile

When multiple users synchronize with a remote database, transaction conflicts can occur which might result in data loss. The Insert-Transaction Failure functionality minimizes synchronization transaction conflicts and eliminates the potential for data loss. If transaction conflicts are unavoidable, then the Synchronization Service for the Siebel Mobile disconnected application captures the transaction information so that the data can be recovered. For more information, see "Handling Insert-Transaction Failures in Siebel Mobile Disconnected Applications" on page 7-1.

Handling Insert-Transaction Failures in Siebel Mobile Disconnected Applications

When the server executes an insert transaction and the insert transaction fails, the insert-transaction failure can be handled in one of the following ways:

- A record is logged that indicates the insert transaction failed, and synchronization continues. This is the default insert behavior. You can use the Conflict Administration screen to recover the data.
- The insert-transaction failure is logged, including the details of the failure, and synchronization is interrupted. This is the FailOnError behavior. FailOnError behavior guarantees that if an insert transaction fails, then data loss does not occur since the synchronization is stopped and until the cause of the failure is resolved.

> **Note:** If FailOnError processing takes place, then the synchronization is interrupted. The synchronization process continues to fail until the problem is resolved. Users must contact their system administrators to recover from the failure. The recovery effort can involve modifying transactions queued for processing, modifying data on the server, or reentering transactions through the Siebel Mobile disconnected application.

You can enable the processing of insert-transaction failure globally or at the business component level when you configure the Siebel Mobile disconnected application. The following setting applies globally in the application: DefaultHandheldInsertMode. When FailOnError is specified, every failed insert-transaction interrupts synchronization.

To handle insert-transaction failures

1. Navigate to the Administration - Siebel Mobile screen, Application Administration, and then the Settings view.

2. Select the appropriate mobile application in the top applet.

3. In the Value field, specify the value for the DefaultHandheldInsertMode parameter by selecting one of the values shown in the following table.

Value	Description
NoFail	Insert-transaction failures are logged, and the synchronization continues. This is the default behavior.
FailOnError	Insert-transaction failures are logged, and the synchronization ends. The system administrator must investigate to recover from this failure. For more information, see "Obtaining Error Details from Synchronization Sessions" on page 4-20.

You can also use the HandheldInsertFailMode user property to enable the processing of insert-transaction failures at the business component level.

Table 7–1 shows the combined effect of the DefaultHandheldInsertMode setting in the Settings view and on a business component. Note that the following conditions apply:

- The business component setting always takes precedence over the settings defined in the Administration - Siebel Mobile, Application Administration, Settings view.

- If there is no setting on a particular business component, then the Applications Settings value applies.

- If there is no setting in either the Settings view or on the business component, then the default behavior is the same as NoFail. Insert-transaction failures are logged, and the synchronization continues.

In Table 7–1 the Tools Configuration column shows what DefaultHandheldInsertMode is equal to, and the Application Settings Value column shows the available application values. Reading down the first column in Table 7–1 and then from left to right, a NoFail business component setting in Siebel Tools combined with a FailOnError application setting results in the combined effect of NoFail.

Table 7–1   Combined Effect of Insert-Transaction Failure and the Settings

Tools Configuration (User Property)	Application Settings Value: No Fail	Application Settings Value: FailOnError	Application Settings Value: Omitted
NoFail	NoFail	NoFail	NoFail
FailOnError	FailOnError	FailOnError	FailOnError
No Setting on Business Component	NoFail	FailOnError	NoFail

Related Topics

"Defining the Settings for Processing Insert-Transaction Failure" on page 7-3

"Obtaining Error Details from Synchronization Sessions" on page 4-20

Defining the Settings for Processing Insert-Transaction Failure

The following task shows you how to use the processing settings for insert-transaction failures.

To define the settings for processing insert-transaction failures

■ Set Application Settings to FailOnError during development and testing to capture synchronization errors.

Related Topic

"Handling Insert-Transaction Failures in Siebel Mobile Disconnected Applications" on page 7-1

Resolving Conflicts and Recovering Error Data in Siebel Mobile

You can monitor synchronization sessions and synchronization conflicts for Siebel Mobile disconnected applications from a number of views within the Administration - Siebel Mobile screen, and also by reviewing your notification messages. For more information, see the following:

■ "Monitoring Synchronization Sessions for Siebel Mobile Disconnected Applications" on page 4-18

■ "Reviewing Notification Messages in Siebel Mobile" on page 8-11

Selected synchronization and conflict errors are stored in the database. This mechanism is always enabled. You can view the errors using the Conflict Administration screens. For more information about resolving conflicts and recovering error data, see the following:

■ "Obtaining Error Details from Synchronization Sessions" on page 4-20

■ "Obtaining Business Component Information from Synchronization Conflicts" on page 4-21

■ "Obtaining an Audit Trail for Synchronization Sessions" on page 4-21

■ "Responding to Synchronization Errors in Siebel Mobile Disconnected Applications" on page 4-21

8

Getting Started with Siebel Mobile Disconnected Applications

This chapter describes how to get started with Siebel Mobile disconnected applications, and the common procedures that you can execute in online (connected) and offline (disconnected) mode in all Siebel Mobile applications. Tasks and features that are not supported in offline mode are called out. It includes the following topics:

- Logging In to Siebel Mobile Applications
- Navigating Siebel Mobile Applications User Interface
- Managing Records in Siebel Mobile
- Reviewing Notification Messages in Siebel Mobile
- Configuring Application Settings for Siebel Mobile
- Displaying Location Details in Siebel Mobile
- Running Predefined Queries in Siebel Mobile
- Scanning Barcodes from Siebel Mobile
- Using Attachments in Siebel Mobile
- Starting an External Application from Siebel Mobile
- Printing from Siebel Mobile Applications
- Integrating Siebel Mobile with Native Device Features
- Siebel Mobile Application Logging
- Process of Using Siebel Mobile Applications in Offline Mode
- Logging Out of Siebel Mobile
- Unsupported Siebel Mobile Features in Offline Mode

Note :   For more detailed information about Siebel Pharma and Siebel Service, see the appropriate guide on the Siebel Bookshelf: *Siebel Life Sciences Guide* and *Siebel Field Service Guide*.

Logging In to Siebel Mobile Applications

This topic describes how to log in to Siebel Mobile applications on your mobile device.

> **Note :** Siebel Mobile disconnected applications are supported only on Safari and Chrome browsers.

To log in to Siebel Mobile applications

1. Start the browser on your mobile device.

2. Type the URL address for Siebel Mobile disconnected applications in the following format:

   ```
   http://<web site domain>/<objmgr_<lang>/start.swe
   ```

   For example, if the Web site is www.localhost.com and the Siebel Application Object Manager component (Objmgr) is epharmam_enu or servicem_enu, then the URL is as follows:

   ```
   http://www.localhost.com/epharmam_enu/start.swe
   http://www.localhost.com/servicem_enu/start.swe
   ```

   Do not omit start.swe or use a previous URL (with SWE commands) because the connection to the server might fail. You can also create an icon on your iPad for the mobile application, and tap this icon to start the application, rather than typing the URL address each time to start the application. Siebel Mobile disconnected applications have their own URL addresses, which are different from the URL addresses that you use to access the Siebel applications on a desktop. You can access Siebel Business Applications with full functionality on your mobile device browser by logging in using the appropriate URL address.

3. Type your login credentials, for example, as follows:

   ```
   UserID: JSmith
   Password: password
   ```

   > **Note :** In offline mode, you will not be prompted to re-enter your login credentials when you relaunch the mobile application after performing a full download.

4. (Optional) Tap the HTML5 Browser Compatibility link on the login screen to show your browser's compatibility with HTML5 features.

   HTML5 is a core technology markup language of the Internet and is used to structure and present content on the Web. If an HTML5 feature is not compatible with your browser, then you can tap the question mark icon to review more information about that feature and about the limitations that you might experience in the Siebel CRM application because of its incompatibility.

5. Tap Login, and then tap Increase when prompted with the following message:

   ```
   Do you want to allow "http://localhost" to use up to 50MB of storage on your
   iPad
   ```

When you log in to Siebel Mobile disconnected applications, you are connected to a unique mobile-enabled, and offline-enabled Siebel Application Object Manager for the Siebel application. By default, you log in to Siebel Mobile disconnected application in connected mode, where you are connected to the Siebel Server. Notice that the airplane icon on the application banner is gray, which indicates a connected state.

6. If this is your first time logging in to the application, then accept the Siebel Mobile End User License Agreement when prompted; otherwise, you will not be able to continue.

Navigating Siebel Mobile Applications User Interface

The user interface for Siebel Mobile applications is divided into three areas: The application banner, the left pane, and the right pane.

The callouts in Figure 8–1 show these three areas.

If you navigate away from the Siebel Mobile application in online or offline mode and then return to the application, then the Siebel Mobile application reloads. The current application context is also maintained even after the application reloads. You can navigate away from the Siebel Mobile application by, for example, selecting a URL link from within the application on your iPad or switching to another application.

Figure 8–1 Siebel Mobile Application: Application Banner, Left and Right Panes
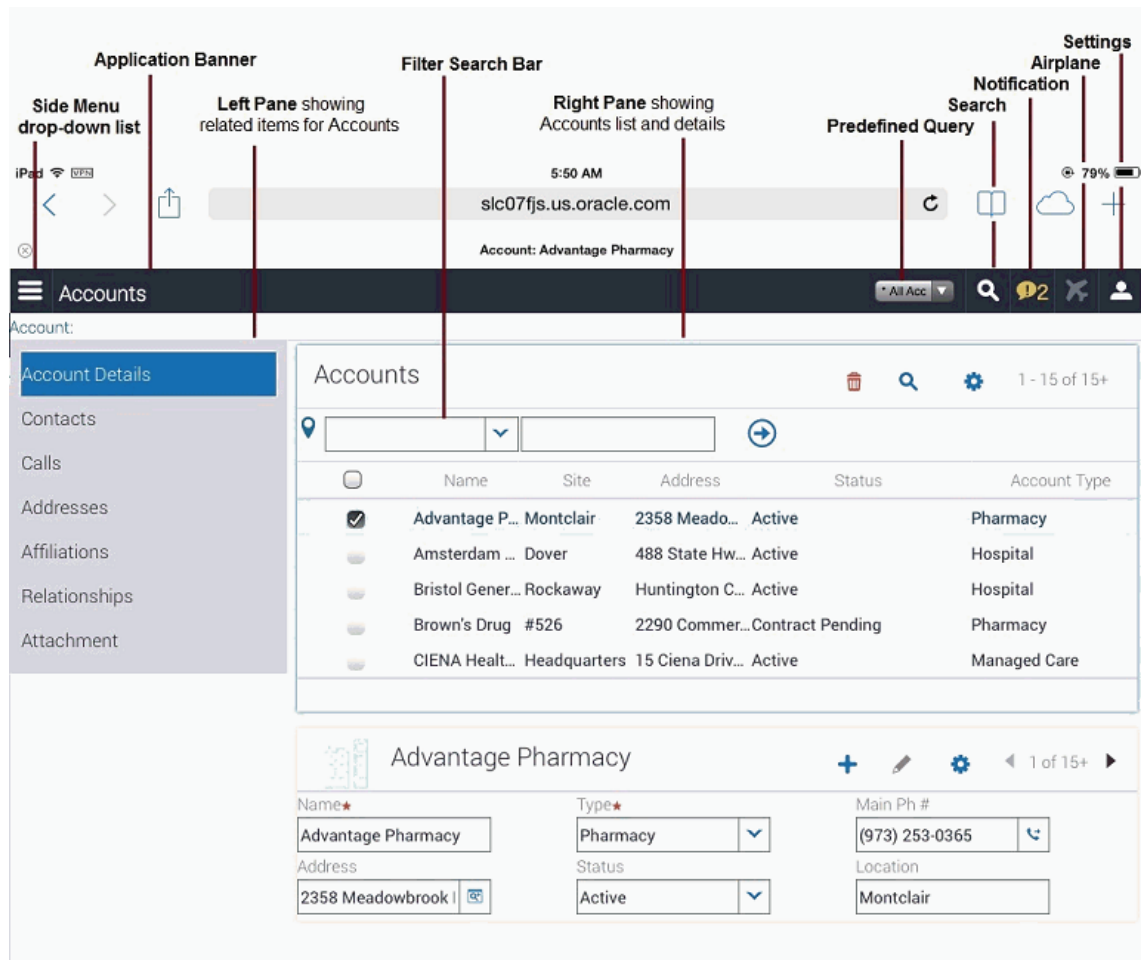
Application Banner

The application banner appears along the top of the UI, and it persists for all views. The Side Menu is available on the left side of the application banner and the following options are available on the right side as shown in Figure 8–1: PDQ (Predefined Query) drop-down list, Search, Notification, Airplane, and Settings.

- **Side Menu.** Tap the Side Menu icon to display the Siebel Objects available in the Siebel Mobile application. Selecting any Siebel object redirects you to a screen where you can manage the selected Siebel object. Table 8–1 shows the Siebel objects that are typically available from the Side Menu for each Siebel Mobile disconnected application.

- **PDQ.** Tap the drop-down list to display a list of the available predefined queries, which you can run for the object selected from the Side Menu. For more information, see "Running Predefined Queries in Siebel Mobile" on page 8-18. PDQ is not supported in offline mode.

- **Search.** Tap the magnifying glass icon to perform a search. For more information, see "Searching for Records in Siebel Mobile" on page 8-9.

- **Notification.** Tap the exclamation mark icon to display notification messages. For more information, see "Reviewing Notification Messages in Siebel Mobile" on page 8-11.

- **Airplane.** Tap the airplane icon to go offline and work in disconnected mode, to go back online after you have finished working in offline mode, or to synchronize data as required. For more information about the behavior of the airplane icon, see "Using the Airplane Icon on the Application Banner" on page 8-36.

- **Settings.** Tap the photo icon to configure the behavior of and notifications for Siebel Mobile disconnected applications, or to log out of Siebel Mobile applications. For more information, see "Configuring Application Settings for Siebel Mobile" on page 8-13. Log out is not supported in offline mode.

Left Pane

The left pane, on the left side of the UI, typically displays the related item information according to the object that is selected from the Side Menu. In Figure 8–1 for example, Accounts is selected from the Side Menu and the related items for Accounts are as follows: Contacts, Calls, Addresses, Affiliations, Relationships, and Attachment.

Right Pane

The right pane or work area, on the right side of the UI, typically displays context information according to the selection that you make from the Side Menu on the application banner, the left pane, and in the UI in general. For example:

- If you tap the Side Menu icon on the application banner and select Accounts, then the following context information appears in the work area:

  - **Object List.** The Accounts list appears at the top of the screen in the work area.

  - **Object Details.** The details for the selected account appear below the Accounts list.

- If you tap the Side Menu icon on the application banner and select Accounts, select an account from the Accounts list in the work area, select Calls from the related items for the account in the left pane, then the following context information appears in the work area:

- **Selected Object Details.** The details for the selected account appear at the top of the screen.

- **Selected Related Item List.** The Calls associated with the selected account appear next.

Table 8–1   Siebel Objects Available from the Side Menu on the Application Banner

Application	Siebel Objects
Siebel Mobile application for Siebel Pharma	The following Siebel objects are typically available from the Side Menu on the application banner: Calls, Accounts, and Contacts. For more information, see Chapter 9, "Using the Siebel Mobile Disconnected Application for Siebel Pharma."
Siebel Mobile application for Siebel Service	The following Siebel objects are typically available from the Side Menu on the application banner: Activities, Service Requests, Accounts, Browser, Orders, Invoices, Assets, and Shifts. For more information, see Chapter 10, "Using the Siebel Mobile Disconnected Application for Siebel Service."

Navigating Siebel Mobile Applications in Landscape Mode

Siebel Mobile works with a variety of mobile and tablet devices. If you are familiar with navigating iPad applications, then you will find that navigating Siebel Mobile s similar. The following procedure shows you how to navigate Siebel Mobile. This procedure assumes that your mobile device is in landscape mode.

To navigate Siebel Mobile in landscape mode

1. Start the browser on your mobile device.

2. Type the URL address for the Siebel Mobile disconnected application, and then log in to the application as shown in "Logging In to Siebel Mobile Applications" on page 8-2.

   The Siebel Mobile home page appears immediately after logging in, and it is the starting point for using application. The following interface elements are present on the home page in landscape mode:

   - **Application banner.** Appears along the top of the home page, and it persists for all views. For more information about the options available on the application banner, see "Application Banner" on page 8-4.

   - **Left pane.** Displays related item information according to the object that is selected from the Side Menu on the application banner.

   - **Right pane (work area).** Displays context information according to the selection that you make from the Side Menu on the application banner, the left pane, and in the UI in general.

3. To navigate away from the current list and details view, tap the Side Menu icon on the application banner and choose another Siebel object.

4. To search for records in Siebel Mobile applications, see "Searching for Records in Siebel Mobile" on page 8-9.

5. To create, modify, or delete records in Siebel Mobile applications, see "Managing Records in Siebel Mobile" on page 8-7.

6. To log out of Siebel Mobile, see "Logging Out of Siebel Mobile" on page 8-42.

Navigating Siebel Mobile Applications in Portrait Mode

You navigate Siebel Mobile in portrait mode in much the same way as in landscape mode, except for one difference. The home page displays only the application banner and the work area by default. That is, there is only one pane in portrait mode.

The following procedure shows you how to navigate Siebel Mobile in portrait mode. This procedure assumes that your mobile device is in portrait mode.

To navigate Siebel Mobile in portrait mode

1. Start the browser on your mobile device.

2. Type the URL address for the Siebel Mobile disconnected application, and then log in to the application as shown in "Logging In to Siebel Mobile Applications" on page 8-2.

   The Siebel Mobile home page appears immediately after logging in, and it is the starting point for using the application. The following interface elements are present on the home page in portrait mode:

   ■ **Application banner.** Appears along the top of the home page, and persists for all views. For more information about the options available on the application banner, see "Application Banner" on page 8-4.

   ■ **Work area.** Displays context information according to the selection that you make from the Side Menu on the application banner and in the UI in general.

3. To navigate away from the current view, tap the Side Menu icon on the application banner and choose another Siebel object.

4. To search for records in Siebel Mobile applications, see "Searching for Records in Siebel Mobile" on page 8-9.

5. To create, modify, or delete records in Siebel Mobile applications, see "Managing Records in Siebel Mobile" on page 8-7.

6. To log out of Siebel Mobile, see "Logging Out of Siebel Mobile" on page 8-42.

Selecting Fields, Drop-Down Lists, and Records

When selecting fields, drop-down lists, and records in Siebel Mobile, you can perform the following actions:

■ Tap an editable field in the application to automatically display one of the following, according to the field type: drop-down list, text box, or date selector.

  A star icon beside a field name indicates that the field is a required field. Some required fields have a default value, other required fields display an error if no value is entered.

■ Tap anywhere on a drop-down list field to open the drop-down list.

■ Select multiple options from an associated drop-down list.

  Tap once to select an option. Tap the same option again to deselect the option.

■ Tap a record to open and display the record details.

■ Tap a related item belonging to a record to open the related item.

■ Close a dialog box by tapping anywhere outside the dialog box.

■ Double-tapping is supported in Siebel Mobile.

  For example, you can close a dialog box by double-tapping the selected entry in the dialog box.

Inline Editing

Inline editing is configured by default in Siebel Mobile and allows you to do the following:

- Edit fields directly on Form (detail) and List applets without opening the Edit page for the record.

- Edit fields in tables, windows and dialog boxes, and in many linked records on main record Form (detail) applets.

You cannot edit fields inline if any one of the following is true:

- If the field is read-only, then you cannot edit the field inline.

- If the field is a calculated field, then you cannot edit the field inline.

After you edit the fields in a record, you must navigate away from the record to save your changes to it.

Check Boxes

Check boxes can be configured to appear in one of the following formats in your mobile application:

- **As a regular check box.** Tap the check box to display a check icon. Tap the check box again to remove the check icon.

- **As a flip switch.** This is the default behavior. Tap or swipe the switch to display On. Tap or swipe the switch again to display Off.

For more information about customizing check boxes, see *Configuring Siebel Open UI*.

Data Display

For each applet in your mobile application, you can configure the data in the applet to display in list, tile, or tabular format. For more information about how to configure lists, tiles, and tables for Siebel Mobile application data, see *Configuring Siebel Open UI*.

Managing Records in Siebel Mobile

This topic contains the following information:

Creating Records in Siebel Mobile

You can add or create a record from different areas within Siebel Mobile using the plus (+) icon.

> **Note :** You cannot directly add or create records using the double plus (++) icon in offline mode. In the case of child views where records are being associated, associating a downloaded record with a selected record using the plus (+) icon is supported in offline mode.

When you add or create records, note the following about data entry:

- You can type information directly into some fields, or select values from a drop-down list.

- When you tap some fields, another dialog box appears from which you can select values or type values.

- For some fields that already have a value, you can tap an icon to the right of the field to display a window from which you can select values or type values.

   For example, you can tap the pin icon to display location details. For more information, see "Displaying Location Details in Siebel Mobile" on page 8-17.

> **Note :** This field functionality is not supported in offline mode.

- A star icon beside a field name indicates that the field is a required field.

To create records in Siebel Mobile

1. From any page within your Siebel Mobile disconnected application, tap the plus (+) icon.

2. Type the details for the new record.

3. Tap Save to save the record.

Linking Records to Your Selected Record

You can link one record to another. Linking records gives you access to all related information from records that you view. For example, you can see a complete view of customer information by linking contacts, opportunities, and activities to an account record.

You can associate a single record (single association) to the record that you are working with or you can select multiple records (multiple associations) to link to the record that you are working with as follows:

- **Single associations** are supported in form and list views. For example, when associating an existing contact to an account in the Siebel Mobile application for Siebel Pharma, you can select the contact in the single-association popup window that opens.

- **Multiple associations** are supported in form and list views. For example, when creating an account call in the Siebel Mobile application for Siebel Pharma, you can select multiple contacts to attend a call using the Attendees related item. A multi association popup window opens when you tap Attendees, and you can select one or more contacts as required.

Search supports searches for values within a single-association or multiassociation popup window. This feature enables you to filter search results.

Searching for Records in Siebel Mobile

You can perform a global search in Siebel Mobile by tapping the magnifying glass icon, shown in Figure 8–1, on the application banner. Elsewhere in Siebel Mobile, you can search or query for records provided that a search control has been configured in Siebel Tools for the specific view or applet in question.

If you do not see a magnifying glass icon or a search bar when you navigate to a view or applet in Siebel Mobile, then a search control has not been configured in Siebel Tools for that particular view or applet.

You perform searches in Siebel Mobile in the same way that you perform searches in Siebel CRM. For more information about querying and searching for records in Siebel CRM, see *Siebel Fundamentals Guide for Siebel Open UI*. For more information about configuring Siebel search controls, see *Siebel Search Administration Guide*.

> **Note :** The Search bar is not supported in offline mode, except to perform barcode-related functionality.

Modifying Records in Siebel Mobile

Use the following procedure to modify records in Siebel Mobile.

To modify records

■ From any Form (detail) applet within Siebel Mobile, do the following:

- Tap the record field that you want to update, and update the field value. You might not be allowed to update all fields in the record.

- Navigate away from the record or tap Save to save your changes to it.

Deleting Records in Siebel Mobile

The following procedure shows you how to delete records in Siebel Mobile. Users can delete the records that they own only in online mode. The delete button is disabled for business components that are marked as Owner Delete.

To delete records

1. Navigate to and select the record that you want to delete.

2. Tap the dustbin icon and then tap Yes when prompted for confirmation to delete the record.

   In list format, you can also swipe (from left to right) over the record you want to delete and then tap Delete.

> **Note :** In offline mode, you can only swipe and delete the records that you own.

About the Cogwheel Icon in Siebel Mobile

A cogwheel icon typically appears on all list and detail pages in Siebel Mobile. The following options are available when you select the cogwheel icon, but you can configure other options for the cogwheel menu as required by using Siebel Tools:

- **About Record.** See "Reviewing Record Summary Information" on page 8-10.

- **Record Count.** See "Displaying the Total Number of Records" on page 8-10.

- **Create Bookmark.** See "Creating Bookmarks in Siebel Mobile" on page 8-11.

- **Columns Displayed.** See "Formatting the Columns to Display in the List View" on page 8-11.

For more information about configuring the cogwheel menu for Siebel Mobile, see *Configuring Siebel Open UI*.

> **Note :** The cogwheel icon is not supported in offline mode. You must be connected to the Siebel Server to use the cogwheel menu in Siebel Mobile disconnected applications.

Reviewing Record Summary Information

Use the following procedure to review the summary information for a selected record.

> **Note :** This task is not supported in offline mode.

To review record summary information in Siebel Mobile

1. Navigate to and select the record whose summary information you want to review.

2. Tap the cogwheel icon in the work area and then select About Record.

   The summary information for the selected record appears and includes the following data:

   - The date when the record was created and by whom

   - The last date the record was updated and by whom

   - The number of modifications that have been made to the record

3. Tap OK to close the record summary information.

Displaying the Total Number of Records

Use the following procedure to display the total number of records in a parent object.

> **Note :** This task is not supported in offline mode.

To display the total number of records in a parent object

1. Navigate to the parent object view that you want by doing one of the following:

   - Tap the Side Menu icon on the application banner and then select an object from the drop-down list.

   - Tap the Side Menu icon, select an object from the drop-down list, and then a related item from the left pane.

2. Tap the cogwheel icon in the work area and then select Record Count.

   The total number of records in the parent object is returned.

3. Tap OK to close the record count information.

Creating Bookmarks in Siebel Mobile

Use the following procedure to create bookmarks for information that you want to return to later.

> **Note :** This task is not supported in offline mode.

To create bookmarks in Siebel Mobile

1. From any page within Siebel Mobile, tap the cogwheel icon, and then select Create Bookmark.

A dialog box opens showing the URL address for the current page.

2. Copy the URL address and save it elsewhere (for example, in an email).

3. Tap OK to close the dialog box.

Formatting the Columns to Display in the List View

Use the following procedure to specify the columns to appear in the list view and in what order. Columns Displayed option is available on list pages only. Columns Displayed is not available on detail pages.

> **Note :** This task is not supported in offline mode.

To format the columns to display in the list view

1. Navigate to the object view that you want by doing one of the following:

- Tap the Side Menu icon on the application banner and then select an object from the drop-down list.

- Tap the Side Menu icon, select an object from the drop-down list, and then a related item from the left pane.

2. Tap the cogwheel icon in the work area and then select Columns Displayed.

3. In the dialog box that opens, do the following:

a. Use the left and right arrows to move the column items between the Selected Columns list and the Available Columns list.

b. Use the up and down arrows to reorder the Selected Columns list.

c. Tap Save when done.

Reviewing Notification Messages in Siebel Mobile

You can receive notification messages from time to time. Notifications provide a way for administrators, managers, and other users with access to the Message Broadcast view in Siebel CRM to send important information directly to user screens.

You review notification messages in Siebel Mobile by tapping the exclamation icon, which is shown in Figure 8–1, on the application banner. Note the following:

- The counter beside the exclamation icon indicates the number of messages that are waiting for you to read.

- When there are zero messages, the exclamation icon is dark-gray with a light-gray zero.

- If there is one or more message waiting to be read, then the exclamation icon shows the color of the highest priority unread message.

- If there is one or more message waiting to be read that has an Urgent with Alert severity, then the exclamation icon blinks. The exclamation icon stops blinking after the message is read.

- The exclamation icon does not blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.

   Note :   Using the notification feature is not supported in offline mode.

To review notification messages in Siebel Mobile

1. Tap the exclamation icon on the application banner.

   The Notification Summary list opens. Note the following:

   - The messages that you have not read appear at the top of the list.

   - The messages that you have already read appear in the Previously Read section. A grayed-out message indicates that you have already read the message.

   - The vertical line next to a message, which is color coded, indicates the severity level of message, as shown in the following table.

Severity Level	Color of Vertical Line Next to Message
Normal	Grey
High	Yellow
Urgent	Red
Urgent with Alert	Red

2. Tap a message to open and review the details of the message. All notification messages are read-only.

   a. Tap any attachment that is part of a message to open and view the attachment.

   b. Tap any hyperlink that is part of a message to navigate to the associated view.

   c. Tap the message again to close it after you have read it.

      After you read a new message, the following happens:

      – The message moves to the Previously Read section on the Notification Summary list.

      – The counter beside the exclamation icon on the application banner decreases accordingly.

   d. Tap Delete (the X icon) to delete a message after you read it.

After you delete a message, the message disappears from the Notification Summary list.

3. Tap Mark as Read (the check icon at the top of the Notification Summary list) to clear all unread messages and mark them as read.

Modifying Notification Messages

Administrators can modify the code internally for notification messages on either the client or server-side using the following APIs:

- **AddNotification.** Creates a notification and returns the Row_Id of the notification.

- **DeleteNotification.** Deletes a notification using the Row_Id.

- **UpdateNotification.** Updates a notification using the Row_Id.

- **ReadNotification.** Returns the notification details using the Row_Id.

For more information about these APIs, see *Configuring Siebel Open UI*.

The following procedure shows you how to create new and modify existing notification messages in Siebel CRM by navigating to the Administration Communication screen, then the Message Broadcast view.

To modify notification messages in Siebel CRM

1. Log in to the Siebel business application as administrator.

2. Navigate to the Administration Communication screen, then the Message Broadcast view.

3. In the Message field, edit the existing message or type the text to create a new message.

4. Use the Recipient Position and Recipient Division fields respectively to select the positions and divisions associated with the users to whom to send the notification message.

   For more information about modifying notification messages in Siebel CRM, see the topics about creating and modifying a message broadcast in *Siebel Applications Administration Guide*.

   After you update an existing or create a new notification message in Siebel CRM, the updated or new message is sent directly to Siebel Mobile application screens and the counter beside the exclamation icon on the application banner increases to indicate that a new message has arrived. If the new message waiting to be read has an Urgent with Alert severity, then the exclamation icon also blinks on the application banner.

Related Topic

Configuring Application Settings for Siebel Mobile

Note : You must be connected to the Siebel Server to perform the procedures described in this topic. In offline mode, you will not be able to access Siebel Mobile application settings.

You can configure the application settings for Siebel Mobile using the photo icon, which is shown in Figure 8–1, on the application banner. When you tap the photo icon on the application banner, the following information appears:

- The logged in user's photo, provided one is uploaded to the user's profile on Siebel Server. Otherwise, a default generic photo appears. For more information, see "Uploading a User Profile Image to Siebel Server" on page 8-14.

- The logged in user's name and email address.

- The following options: Settings and Logout.

  - **Settings.** This option has the following suboptions: Behavior and Notifications.

    Behavior. See "Configuring Application Behavior Settings for Siebel Mobile" on page 8-14.

    Notifications. See "Configuring Notification Settings for Siebel Mobile" on page 8-16.

  - **Log Out.** See "Logging Out of Siebel Mobile" on page 8-42.

Uploading a User Profile Image to Siebel Server

The following procedure shows you how to upload a user profile image to Siebel Server. This uploaded user profile image will appear instead of the default generic photo for Settings in Siebel Mobile disconnected applications.

To upload a user profile image to Siebel Server

1. Log in to the Siebel business application.

2. Navigate to the Administration - User screen, then the Persons view.

3. Select the record whose user profile image you want to personalize.

4. Go to the Image field on the form that appears and do one of the following as required:

   - Type the full relative path to an image on a local server, for example, as follows:

     c:/images/photo.png

   - Type the full URL address to an image stored externally, for example, as follows:

     http://<xyz.server.com>/-7rbVFtLM9yE/AAAAAAAAAAI/AAAAAAAAAAA/lCL1 8P-yc8I/s96-c/photo.jpg

5. Save the record.

   When the user next logs in to the application, Settings on the application banner shows the logged in user's profile image that is uploaded to the Siebel Server, and not the default generic photo.

Configuring Application Behavior Settings for Siebel Mobile

Note :   This task is not supported in offline mode. You must be connected to the Siebel Server to perform this task.

You use the Behavior option under Settings to configure the application behavior for Siebel Mobile including the startup view, navigation control, UI theme, and view transition.

- **Startup View.** The default startup view for Siebel Mobile varies according to the mobile application that you are using, but you can change the startup view as required.

- **Navigation Control.** The default navigation control for Siebel Mobile disconnected applications is Side Menu (hamburger navigation control), but you can change this to Tab or Tree as required, provided that the control is configured for your mobile application.

- **Theme.** The default UI theme that is used by Siebel Mobile is Mobile disconnected applications is Theme, but you can change this to a custom theme as required, provided that a custom theme is configured for your mobile application.

- **Transition.** The default view transition that is set for Siebel Mobile disconnected applications is None, but you can change this to a custom view transition as required, provided that a custom view transition is configured for your mobile application.

For more information about navigation control configuration, creating a new mobile theme, and creating a custom view transition for Siebel Mobile, see *Configuring Siebel Open UI*.

To configure the application behavior settings for Siebel Mobile

1. Tap the photo icon on the application banner, and then select the Settings option.

2. Tap Behavior, and then complete the fields shown in the following table as required.

Field	Description
Startup View	The name of the view to display when the mobile application starts. Tap Startup View, and select a view from the drop-down list.
Navigation Control	Specifies the navigation control to use in the mobile application. Tap Navigation Control, and select one of the following options as required: **Side Menu.** Indicates to use the hamburger navigation control (the default navigation control) in the mobile application where all Siebel objects appear in a *menu* drop-down list in the UI. **Tab.** Indicates to use the tab navigation control in the mobile application where all Siebel objects appear in format in the UI. **Tree.** Indicates to use the tree navigation control in the mobile application where all Siebel Objects appear in format in the UI.
Theme	The UI theme to use throughout the mobile application. Tap Theme, and select a theme from the drop-down list.
Transition	The view transition mode to use when moving from one view or applet to another view or applet in the mobile application. Tap Transition, and select a view transition from the drop-down list. The options are: None, Slide In, Slide Left, Flip, and Fade.

Field	Description
Confirm Before Deleting Record	Specifies whether or not to prompt users for confirmation before deleting a record, as follows: ■ **On** indicates to prompt users for confirmation. ■ **Off** indicates not to prompt users for confirmation before deleting a record. Tap the Confirm Before Deleting Record option so that a check icon or On appears. Tap the option again so that X or Off appears.
Log Events	Set Log Events to one of the following options to configure Logging for Siebel Mobile disconnected applications: Metadata Extraction, Data Extraction - Basic, Data Extraction - Detailed, ClientSystem, UpSync, or All. For more information, see "Siebel Mobile Application Logging" on page 8-31.

3. Tap Save.

Configuring Notification Settings for Siebel Mobile

> **Note :** This task is not supported in offline mode. You must be connected to the Siebel Server to perform this task.

You use the Notifications option under Settings to configure the settings for notification messages in your Siebel Mobile disconnected application.

To configure the notification settings for Siebel Mobile

1. Tap the photo icon on the application banner, and then select the Settings option.

2. Tap Notifications, and then complete the fields shown in the following table as required.

Field	Description	Example Value
Update Interval (Seconds)	Type the time interval in seconds at which you want notifications to refresh.	120
Prefix of Normal Priority Message	Type the text to appear before a normal-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	N
Prefix of High Priority Message	Type the text to appear before a high-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	H
Prefix of Urgent Priority Message	Type the text to appear before an urgent-priority message. This aids accessibility. For example, a letter is useful if you have difficulty distinguishing the colors of the messages.	U

3. Tap Save.

Displaying Location Details in Siebel Mobile

Global Positioning System (GPS) is integrated with Siebel Mobile so that when you tap the pin icon shown in Figure 8–2, a map window opens showing the location details. Mapping is configured by default for some list and form applets in Siebel Mobile, but you can set up mapping for any other Siebel Mobile applet as required by configuring the pin icon (or map functionality) in Siebel Tools for the applet in question. For more information, see the topics about maps in *Configuring Siebel Open UI*.

Figure 8–2   Siebel Mobile Application: Pin Icon

The pin icon is available in the right pane or work area of Siebel Mobile, provided that the map functionality is enabled for the mobile application. If you cannot see the pin icon or if you can see it but it is disabled, then the map functionality is not enabled for the mobile application.

Information about the following is included in this topic:

- "Enabling the Map Functionality for Siebel Mobile" on page 8-17
- "Displaying Route Details Using the Pin Icon" on page 8-17

> **Note :**   Displaying location details using the pin icon is not supported in offline mode. You must have an internet connection to display location details.

Enabling the Map Functionality for Siebel Mobile

The map functionality is disabled by default in Siebel Mobile. Before you can use the map functionality in Siebel Mobile, you must enable it first. This involves enabling location services and disabling block pop-ups on your mobile device.

To enable the map functionality for Siebel Mobile

1. Enable location services on your mobile device (iPad) as follows:

    a. Start your iPad.

    b. Go to Settings, Privacy, Location Services, and then turn on Location Services.

    If location services are disabled on your mobile device, then you will not be able to use the map functionality in Siebel Mobile applications.

2. Disable block pop-ups on your mobile device (iPad) as follows:

    a. Start your iPad.

    b. Go to Settings, Safari, and then turn off Block Pop-ups.

Displaying Route Details Using the Pin Icon

The following procedure shows you how to use the pin icon to display the route details for a call or an account. The procedure is the same when using the pin icon in other views. This procedure assumes that the map functionality is enabled for Siebel Mobile as shown in "Enabling the Map Functionality for Siebel Mobile" on page 8-17.

To display route details using the pin icon

1. Navigate to and open a call or an account in your Siebel Mobile application.

   All details for the selected call or account appear in the work area.

2. Tap the pin icon in the work area.

3. If prompted, select Allow to enable Siebel Mobile to use the location of your mobile device.

   A map window opens with pins pointing to the location of the selected call or account, and showing the route from starting address (current mobile device location) to the destination call or account address.

   If a route is not found for a given address, then an error message appears in the map window.

Running Predefined Queries in Siebel Mobile

You can run a saved predefined query (if available) for some Siebel objects in Siebel Mobile, as shown in the following procedure.

> **Note :**   This task is not supported in offline mode.

To run a predefined query in Siebel Mobile

1. Tap the Side Menu icon on the application banner and then select an object from the drop-down list.

2. Tap the PDQ drop-down list (shown in Figure 8–1) on the application banner to display the list of saved predefined queries for the object.

   Scroll up and down the predefined query list that opens to find the query that you want to run.

3. Tap a predefined query in the list.

   This step runs the predefined query, returning the appropriate data in the list view.

4. Tap PDQ on the application banner again to close the predefined query.

Scanning Barcodes from Siebel Mobile

Barcode scanning is supported by default for activity parts in the Siebel Mobile application for Siebel Service. To use the barcode feature in a different application view, then you must set up the barcode interface for the view in question. To use the barcode feature in a different Siebel Mobile application (for example, the Siebel Mobile application for Siebel Pharma), then you must set up the barcode interface for a view in the required mobile application. For more information about setting up the barcode interface, which is an administrator task, see the chapter about barcodes in *Siebel Field Service Guide*.

- The barcode interface in the Siebel Mobile application for Siebel Service allows you to scan barcodes for parts using a barcode reader. For more information, see "Modifying Activity Parts by Scanning Barcode Data" on page 10-9.

- You can also search for records by scanning barcode data in the Siebel Mobile application for Siebel Service. For more information, see "Searching for Records by Scanning Barcode Data" on page 8-19.

Searching for Records by Scanning Barcode Data

You can use a barcode reader to search for records in the Siebel Mobile application for Siebel Service by scanning barcode data. For example, the following procedure shows you how to search for a service request by scanning the service request number. For more information about the barcode functionality in Siebel Mobile, see "Scanning Barcodes from Siebel Mobile" on page 8-18.

To search for records by scanning barcode data

1. Tap the magnifying glass icon on the application banner.

2. In the drop-down list of the search control, select Service Request.

3. Scan the barcode (in this example, the service request number).

    The view that contains the record with the service request data appears, and the record with the service request number appears in that view.

4. To close the search control, select the magnifying glass icon on the application banner again.

Using Attachments in Siebel Mobile

Attachments are supported by default in the Siebel Mobile application for Siebel Pharma version 8.1.1.10 or later. To use attachments in a different mobile application (for example, in the Siebel Mobile application for Siebel Consumer Goods, Siebel Sales, Siebel Service, or Siebel Finance version 8.1.1.10 or later), then you must use the following Siebel Pharma application views as templates and configure them accordingly for the required Siebel Mobile application:

■ Pharma Account Attachments View - Mobile

■ Pharma Contact Attachments View - Mobile

The attachment feature in Siebel Mobile allows you to keep supporting material for account and contact records by permitting you to associate an attachment with individual account and contact records. For more information about using attachments in the Siebel Mobile application for Siebel Pharma, see the following topics:

■ "Setting the Attachment Path" on page 8-20

■ "Modifying Attachment Information for an Account" on page 9-18

■ "Modifying Attachment Information for a Contact" on page 9-27

■ "Managing Attachment Downloads Using the Siebel App" on page 8-29

> **Note :** The attachment functionality is supported both in online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app from the App Store or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container (Siebel app) for iPad and iPhone devices. For more information, see "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22.

Setting the Attachment Path

If your mobile application is running on Windows but your Siebel application (for example, Call Center) is running on AIX, then you will not be able to add attachments in online mode because the attachment path is pointing to AIX. In such a case, you will get an error message similar to the following:

```
ObjMgrLog Error 1 0000394051801038:0 2013-05-09 02:43:27 (dirmgr.cpp (702))
SBL-DAT-00176: The path '\export\home\qa1\23021\fs\userpref' does not exist or is
not a directory.  If the problem persists, please contact your systems
administrator.
ObjMgrLog Error 1 0000394051801038:0 2013-05-09 02:43:27 (modpref.cpp (958))
SBL-DAT-00801: LoadPreferences: \export\home\qa1\23021\fs\userpref\SADMIN&Siebel
ePharma Mobile.spf: Preference file directory not found.
```

To resolve this issue, make sure that you have configured a hybrid server setup for Siebel Mobile. For more information, see "Configuring the Mobile Node for Siebel Mobile Disconnected Application Users" on page 3-15.

Starting an External Application from Siebel Mobile

An external application can be configured in Siebel Tools for Siebel Mobile so that you can start it from within the mobile application. For example, you can link contacts to LinkedIn or Facebook so that you will be able to display a contact's LinkedIn or Facebook profile from within mobile applications. The URL link or icon to start an external application appears on the details page in the work area of mobile applications.

You use the Symbolic URL Administration view in Siebel Tools to specify how the HTTP request to the external application should be constructed and to define any arguments and values to be sent as part of the request. For more information about how to configure an external application to start from Siebel Mobile, see *Configuring Siebel Open UI* and the topic about defining symbolic URLs in *Siebel Portal Framework Guide*.

> **Note :** Starting an external application from within your Siebel Mobile application is not supported in offline mode. You must be connected to the Siebel Server and the Internet to start an external application from within your Siebel Mobile application.

To start an external application from within a mobile application

- Tap the External Application URL link or icon on the details page in the work area.

Printing from Siebel Mobile Applications

You can print from Siebel Mobile, using the print option from your browser's Settings menu, provided that you have access to one of the following:

- A printer that is set up on the wireless network to which your mobile device is connected or a Bluetooth-enabled mobile printer.

- A wireless printer that is compatible with and supports Apple's AirPrint™ technology.

To print from Siebel Mobile

1. With the page that you want to print displayed, tap Settings on the browser navigation bar.

   The following options are available from the browser's Settings menu:

   - Add Bookmark

   - Add to Reading List

   - Add to Home Screen

   - Mail Link to this Page

   - Tweet

   - Print

2. Tap Print, Select Printer, and then the name of your wireless printer.

3. Tap plus or minus to indicate the number of copies that you want to print.

4. Tap Print to start printing.

   If you do not have an AirPrint-compatible wireless printer, then email a link of the page to yourself, open the link on your desktop computer, and then print the page.

Integrating Siebel Mobile with Native Device Features

This topic describes how to integrate Siebel Mobile with native device features. It includes the following information:

- "Overview of Siebel Mobile Integration with Native Device Features" on page 8-21

- "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22

- "Using the Siebel Mobile Archive MAA File (Administrator Task)" on page 8-23

- "Setting Up the Host Server for Siebel Mobile" on page 8-23

- "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24

- "Clearing the Application Cache for Applications Using the Siebel App" on page 8-27

- "Enabling Oracle Policy Automation for Applications Using the Siebel App" on page 8-28

- "Resetting the Siebel Server or Host Server" on page 8-29

- "Managing Attachment Downloads Using the Siebel App" on page 8-29

- "Configuring the Privacy Settings for Native Device Feature" on page 8-30

Overview of Siebel Mobile Integration with Native Device Features

You can access and use the following native device features from Siebel Mobile, provided that you download and set up the Siebel Mobile Application Container (Siebel app) from the Apple App store first:

- **File System Access.** From Siebel Mobile, you can access the native device local hard disk space to read data from and write data to files stored locally on the device using either relative or absolute paths, or the file URL (`file://host/path`).

Depending on mobile application set up and on whether you are using Siebel Mobile connected or disconnected, Siebel Mobile routes commands to the Siebel Server (if online) or local resources (if offline) as required.

■ **Location Services.** From Siebel Mobile, you can use the native device location services to obtain more accurate location data. For more information about using location services on a mobile device, see "Displaying Location Details in Siebel Mobile" on page 8-17 and "Configuring the Privacy Settings for Native Device Feature" on page 8-30.

Note : In the current release of Siebel Mobile, SQLite has replaced WebSQL. Note the following:

■ SQLite implements the SQL database system and its query language is a simplified version of SQL.

■ SQLite is an embedded SQL database engine and it reads and writes to ordinary disk files.

■ Whereas WebSQL implementations have a 50 megabyte data download limit, this limitation does not apply to SQLite.

Downloading and Installing the Siebel Mobile Application Container (Siebel App)

This topic shows you how to download and install the Siebel Mobile Application Container (Siebel app) on your mobile device. You need the Siebel Mobile Application Container to dynamically link to a Siebel Mobile server so that you will be able to access and use the following native device features from Siebel Mobile:

■ Local file system

■ Location services

Use the following procedure to download and install the Siebel Mobile Application Container (Siebel app) from the Apple App Store for iPad and iPhone devices. If you want to create and deploy your own customized Siebel Mobile Application Container, then ignore this procedure and see "Using the Siebel Mobile Archive MAA File (Administrator Task)" on page 8-23 for more information.

To download and install the Siebel Mobile Application Container (Siebel app) from the Apple App Store

1. Start your mobile device.

2. Go to the Apple App Store (`http://store.apple.com/us`) and search for the following app:

    Siebel

3. Tap FREE to download the Siebel app.

4. Tap INSTALL to install the Siebel app.

5. Enter your Apple ID password to install the Siebel app on your mobile device.

6. Configure the Siebel app.

    For more information, see "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

Using the Siebel Mobile Archive MAA File (Administrator Task)

Instead of downloading the Siebel Mobile Application Container (Siebel app) from the App store and installing it on a mobile device as described in "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22, administrators can download the Siebel Mobile archive file (Siebel.maa) from Oracle Software Delivery Cloud (https://edelivery.oracle.com) and use the archive file to create and deploy a customized Siebel app for iPad and iPhone devices.

For more information about how to use Oracle JDeveloper to create a new Mobile Application Framework (MAF) application from an archive (.maa) file, how to deploy the mobile application, and customize the application (for example, replace the application images), see the supporting documentation for Oracle JDeveloper:

http://docs.oracle.com/cd/E53569_01/tutorials/tut_jdev_maf_setup/tut_jdev_maf_setup.html

Setting Up the Host Server for Siebel Mobile

The following procedure shows you how to set up the host server where Siebel Mobile disconnected applications are located. This is a required task if using Siebel Mobile version 2.0.

To set up the host server for Siebel Mobile

1. After installing and configuring Siebel Web Server Extension (SWSE), copy the mobileapplist.lst file from SWSEHome to the host Web server root path.

    For example on Microsoft Windows (IIS), navigate to `Local Disk (C), inetput, wwwroot` and paste a copy of the mobapplist.lst file in this location. On UNIX, copy the .lst file to the Web server root and make sure it supports the .lst MIME type. For more information about setting up MIME types, see Configuring the Web Server for Siebel Mobile Disconnected Applications.

    The following table summarizes the Web server paths for different operating systems.

Field	Web Server Path
Windows	`C:\inetpub\wwwroot\`
Linux	`<Build Installed directory>/web/Oracle_WT1/instances/instance1/config/OHS/ohs1/htdocs`
Solaris	`<Build Installed directory>/ web/ https-localhost/docs`
HP-UX	`<Build Installed directory>/ web / htdocs`
AIX	`<Build Installed directory>/ web / htdocs`

2. Open the mobileapplist.lst file in a text editor.

    The content in the file is as follows:

```
{
"1":{"id":"1","name":"Siebel ePharma
Mobile","lang":"LanguageCode","url":"http(s):// webserver_hostname:http_
port/epharmam_LanguageCode/"},
"2":{"id":"2","name":"Siebel Service for
Mobile","lang":"LanguageCode","url":"http(s):// webserver_hostname:http_
port/servicem_LanguageCode/"}
}
```

3. Edit the mobileapplist.lst file as follows:

   a. Change LanguageCode to the language in which you want to run the application. For example, change LanguageCode to enu to run the application in English.

   b. Depending on your deployment, use http or https for the Siebel Web server URL.

   c. Change http_port to the port number where the Web server is located. For example, change http_port to 8080.

   d. Change epharmam_LanguageCode and servicem_LanguageCode to (for example) epharmam_enu and servicem_enu respectively.

   When finished, the content in the mobileapplist.lst file appears similar to the following:

```
{
"1":{"id":"1","name":"Siebel ePharma Mobile","lang":"enu","url":"http(s)://
www.webserver.com:8080/epharmam_enu/"},
"2":{"id":"2","name":"Siebel Service for
Mobile","lang":"enu","url":"http(s):// www.webserver.com:8080/servicem_
enu/"}
}
```

   e. Save and close the mobileapplist.lst file.

4. Change the MIME type for mobileapplist.lst as follows:

   a. Open Internet Information Services Manager.

   b. Navigate to the Features view and double-click MIME Types.

   c. Right-click the .lst MIME type and select Edit.

   d. In the MIME Type field, type in `text/plain`, and then click OK.

Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device

The topic shows you how to configure the Siebel Mobile Application Container (Siebel app) on an iOS device, which involves the following:

■ Dynamically connecting to a Siebel Server by entering the Siebel Mobile disconnected application URL address (if using Siebel Mobile version 1.0) or host server address (if using Siebel Mobile version 2.0 or later).

   In the case of Siebel Mobile version 2.0, you must set up the host server as shown in "Setting Up the Host Server for Siebel Mobile" on page 8-23. After the host server is set up, you can connect to multiple applications in a single Siebel Mobile Application Container (Siebel app).

■ Clearing the application cache for an application.

■ Enabling OPA for an application.

The following procedure assumes that you have already downloaded and installed the Siebel Mobile Application Container for iOS from the App Store as shown in "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22.

To configure the Siebel Mobile Application Container (Siebel app) on an iOS device

1. Start your mobile device (iPad or iPhone) and then tap Siebel to start the Siebel app.

2. If this is your first time starting the Siebel app on your mobile device, then accept the end-user license agreement.

3. Tap the Springboard icon (hamburger navigation control, bottom left side of the screen) to show the Siebel app dock toolbar on the left side of the screen and the Settings page on the right side.

The Springboard icon persists for all views in the Siebel app. To hide the dock toolbar, tap the Springboard icon again.

On the Settings page in the About section, note the following:

- The Siebel Mobile version number is shown in the Version field.

- You can use the Reset All option to reset the server.

  For more information, see "Resetting the Siebel Server or Host Server" on page 8-29.

4. For Siebel Mobile version 1.0, configure the Siebel app as follows:

a. In the Compatibility section, tap Siebel Mobile 1.0 to turn on backward support for Siebel Mobile version 1.0.

b. In the Connection section, type in the Siebel Mobile disconnected application URL address, for example, as follows:

```
http://siebelserver:Port:/siebelapplication_lang
```

You will be connected directly to this Siebel Server whenever you log in to this application.

c. In the dock toolbar, tap Home.

If the dock toolbar is hidden, tap the Springboard icon and then tap Home in the dock toolbar.

d. On the application login screen that appears, type in the User ID and Password to log in to the application.

5. For Siebel Mobile version 2.0 or later, configure the Siebel app as follows:

a. In the Compatibility section, make sure that backward support for Siebel Mobile version 1.0 is turned off.

b. Set up the Host Server where Siebel Mobile disconnected applications are located as shown in "Setting Up the Host Server for Siebel Mobile" on page 8-23.

c. In the Host Server Address section, type in the host server address where Siebel Mobile disconnected applications are located, for example, as follows:

```
http://hostserveraddress.com
```

You will be connected directly to this host server whenever you log in to an application located at this host server address.

d. Tap Get Application List, and then tap the application (for example, Siebel ePharma Mobile or Siebel Service for Mobile) that you want to connect to from the application list that appears.

The application page opens accordingly (for example, for Siebel ePharma Mobile or Siebel Service for Mobile), from where you can do the following:

- In the Preferences section, tap Show in Dock for the application to appear in the dock toolbar.

–   In the Connection section, type in the Username and Password credentials for the application.

> **Note :**   The Identifier section does not apply to Siebel Mobile connected applications. For more information on the Identifier section, see Step 7.

–   In the dock toolbar, tap the application (for example, Siebel ePharma Mobile or Siebel Service for Mobile) that you want to start.

You will be logged in to the selected application using the Username and Password credentials that you specified in the previous step.

If the dock toolbar is hidden, tap the Springboard icon and then tap the application in the dock toolbar. For more information about the Springboard icon, see Step 3.

The application list is populated from the mobileapplist file that you must configure as shown in "Setting Up the Host Server for Siebel Mobile" on page 8-23. Note that you can connect to multiple applications using the Siebel app.

6. After successful login, swipe left-to-right across the bottom of the screen to show the Siebel app footer toolbar.

The following options are available in the Siebel app footer toolbar:

■   **Springboard icon** for showing and hiding the Siebel app dock toolbar.

■   **Navigation left and right arrow icons** for navigating to the next and previous screens in the Siebel app respectively.

■   **Undo icon** for undoing the previous action in the Siebel app.

■   **Attachment icon** for going to the Attachment Download Manager view. For more information, see "Managing Attachment Downloads Using the Siebel App" on page 8-29.

> **Note :**   The Attachment icon is visible when compatibility for Siebel Mobile 1.0 is turned off. The Attachment icon is not supported and invisible when compatibility for Siebel Mobile 1.0 to turned on.

■   **Close icon** for hiding the footer toolbar in the Siebel app.

7. After successful login to Siebel Mobile disconnected applications, tap Settings in the dock toolbar, and then tap the application that you are logged in to.

In the Identifier section on the application page, notice that the field is now populated with a unique ID (Sync Node ID) identifying the application that was synchronized after successful login.

> **Note :**   The Identifier section applies to Siebel Mobile disconnected only.

8. To clear the application cache for an application, see "Clearing the Application Cache for Applications Using the Siebel App" on page 8-27.

9. To enable OPA for applications, see "Enabling Oracle Policy Automation for Applications Using the Siebel App" on page 8-28.

Clearing the Application Cache for Applications Using the Siebel App

Application cache files improve the way applications work on your mobile device by encouraging pages to load faster. Too much cache information, however, can cause application performance in general to slow down. To prevent a deterioration in application performance, it is recommended that you check the browser cache size and clear the application cache data accordingly from time to time.

The following procedure shows you how to clear the application cache for an application by using the Siebel app on an iOS device. Clearing the application cache involves doing one or both of the following:

- Deleting the attachment files downloaded to a device.

- Removing all mobile application cookies, application cache, and web database data from a device.

To clear the application cache for applications using the Siebel app on an iOS device

1. Start your mobile device (iPad or iPhone) and then tap Siebel to start the Siebel app.

2. For Siebel Mobile version 1.0, clear the application cache as follows:

   a. Make sure that the Siebel app is configured correctly as shown in Step 4 in "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

   b. In the Device section, tap Clear Downloaded Attachments and then tap OK when prompted for confirmation to delete all downloaded files.

   The following message appears when the task is complete: *All the downloaded files have been deleted*.

   c. In the Device section, tap Clear Downloaded Data and then tap OK when prompted for confirmation to delete cookies and data.

   The following message appears when the task is complete: *Cookies and data have been deleted. This will take effect when the application is restarted*.

3. For Siebel Mobile version 2.0, clear the application cache as follows:

   a. Make sure that the Siebel app is configured correctly as shown in Step 5 in "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

   b. In the Application List Available section, tap the application whose application cache you want to clear.

   c. In the Device section, tap Clear Downloaded Attachments and then tap OK when prompted for confirmation to delete all downloaded files.

   d. In the Device section, tap Clear Downloaded Data and then tap OK when prompted for confirmation to delete cookies and data.

   Note that this will take effect when the application is restarted.

Related Topics

"Disabling Private Browsing" on page 3-28

"Clearing the Browser Cache" on page 3-29

"Checking the Browser Cache Size" on page 3-29

"Configuring the Privacy Settings for Native Device Feature" on page 8-30

## Enabling Oracle Policy Automation for Applications Using the Siebel App

The following procedure shows you how to use the Siebel app to enable Oracle Policy Automation (OPA) for an application so that users can access OPA for Mobile Devices as shown in Figure 8–3.

To enable OPA for applications using the Siebel app

1. Start your mobile device (iPad or iPhone) and then tap Siebel to start the Siebel app.

2. Make sure that the Siebel app is configured correctly as shown in "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

3. In the OPA General section, tap Enable OPA to turn on the feature.

   ■ When Enable OPA is turned on, then the option to access OPA for Mobile Devices is available to users by tapping Interview in the dock toolbar.

   ■ When Enable OPA is turned Off (the default setting), then the option to access OPA for Mobile Devices is unavailable to users in the dock toolbar.

   Note : Integrations for Oracle Policy Automation with Siebel Mobile Web Client and Siebel Remote support Siebel Open UI. For more information about such integrations, see the topic about invoking Web services on the Siebel Mobile Web Client in *Integration Platform Technologies: Siebel Enterprise Application Integration*.

Figure 8–3   Siebel Mobile Application Container (Siebel App): Oracle Policy Automation for Mobile Devices
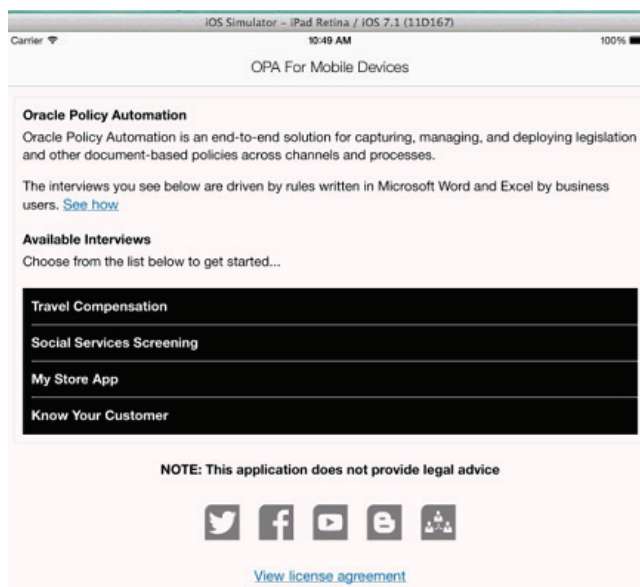
Resetting the Siebel Server or Host Server

The following procedure shows you how to reset the Siebel Server or host server. When you reset the host server, all applications configured on the host server are reset.

To reset the Siebel Server or host server

1. Start your mobile device (iPad or iPhone) and then tap Siebel to start the Siebel app.

2. On the Settings page, tap Reset All.

3. Tap Yes when prompted with the following message:

   Application Data will be reset. This will take effect when the application is restarted.

   The next time you start the application, the connection field or host server address field will be empty.

For more information about connecting to the Siebel Server (if using Siebel Mobile version 1.0) or host server (if using Siebel Mobile version 2.0 or later), see "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

Managing Attachment Downloads Using the Siebel App

If you are using the Siebel app with Siebel Mobile version 2.0 or later, then you can manage the download of attachments using the Attachment Download Manager view.

The Attachment Download Manager view lists all the attachments that have either finished downloading or are scheduled to download and includes the following information for each attachment record:

- **Check box.** If checked, this indicates that the attachment record is selected. If unchecked, the attachment record is not selected.

- **List Order.** A number in the List Order field indicates the rank or sequence number for the attachment record. You can drag and drop each row to change the record sequence or key in a number manually in the List Order field.

- **Entity.** The attachment type.

- **File Name.** The name of the attachment record.

- **Size (KB).** The size of the attachment file.

- **Progress.** The attachment download status, which can be one of the following: Not Downloaded, Queued for Download, Downloaded, File not Available, Downloading.

  Downloading indicates that the attachment is actively downloading and a progress bar shows the progress of the download.

- **Speed.** The attachment download speed.

- **Time Left.** The duration of time to complete the attachment download.

The following procedure shows you how to manage the download of attachments using the Attachment Download Manager view. The view is available in online (connected) mode after the initial full download is complete, and in offline (disconnected) mode where attachments are downloaded during the synchronization process. For more information about synchronization, see "Synchronizing Data" on page 8-39.

> **Note :** The attachment functionality is supported in both online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app from the App Store or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container (Siebel app) for iPad and iPhone devices. For more information, see "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22.

To manage attachment downloads using the Siebel app

1. Start your mobile device (iPad or iPhone) and then tap Siebel to start the Siebel app.

2. Log in to the application where you want to manage attachment download.

   For more information about using the Siebel app to log in to an application, see Step 5 in "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

3. After successful login, swipe left-to-right across the bottom of the screen to show the Siebel app footer toolbar.

   For more information about this footer toolbar, see Step 6 in "Configuring the Siebel Mobile Application Container (Siebel App) on an iOS Device" on page 8-24.

4. Tap the Attachment icon on the footer toolbar to open the Attachment Download Manager view.

5. If required, reorder the attachment list by typing in a number in the List Order field.

6. Select one or more attachment records for download by tapping the check box next to each record.

7. Configure the following Download Settings as required:

   - **Download Only on Wi-Fi.** Tap this check box to indicate to download attachments only on Wi-Fi.

8. Choose one of the following download options as required:

   - **Download.** Tap Download to queue the selected attachment records for download.

   - **Remove.** Tap Remove to delete attachments belonging to the selected attachment records from the mobile device, and cancel any future downloads of or updates to the selected attachment records.

Configuring the Privacy Settings for Native Device Feature

To use native device features such as location services with your Siebel Mobile disconnected application, then you must configure the privacy setting for the feature on your mobile device accordingly as shown in the following procedure.

> **Note :** The following procedure shows you how to configure the privacy setting on an iOS device, but the procedure is similar when configuring privacy on other mobile devices and smartphones.

To configure the privacy settings on an iOS device

1. Start your mobile device (iPad or iPhone).

2. Tap Settings, tap Privacy and then tap Location Services to turn on the setting.

3. The map functionality is now enabled for Siebel Mobile. For more information about using the map functionality, see "Displaying Location Details in Siebel Mobile" on page 8-17.

Siebel Mobile Application Logging

You use the bug icon, shown in Figure 8–4, on the application banner to review the log event messages and debug information for Siebel Mobile applications, provided that logging has been enabled for the application.

Figure 8–4   Siebel Mobile Application: Bug Icon

The bug icon is visible on the application banner only after logging has been enabled for the application. If you cannot see the bug icon on the application banner, then logging has not been enabled for the application yet.

Information about the following is included in this topic:

- "Enabling Logging for Siebel Mobile Application Users" on page 8-31
- "Clearing Log Information for Siebel Mobile Applications" on page 8-33
- "Uploading Siebel Mobile Log Information to Siebel Server" on page 8-33
- "Saving Siebel Mobile Log Information" on page 8-34
- "About Siebel Mobile Log API" on page 8-34

Enabling Logging for Siebel Mobile Application Users

You enable logging in Siebel CRM for each Siebel Mobile application user role and assign users to that role. You configure Log Events for logging in the Siebel Mobile application. You must set Log Events for logging in the Siebel Mobile application when in online mode - that is, when you are connected to the Siebel Server.

To enable logging for Siebel Mobile application users

1. Log in to Siebel Tools and add the following application user property and value for the Siebel Mobile application:

Application User Property	Value
Client Business Service	Web Engine UI Preferences

Note :   The Client Business Service user property is added by default for the Siebel Mobile application for Siebel pharma so it is not necessary to add it again. For all other Siebel Mobile applications, this step is required.

2. Enable logging in Siebel CRM for Siebel Mobile application users:

    a. Log in to the Siebel business application with administrative responsibility.

    b. Navigate to the Administration - Application screen, then the Responsibilities view.

    c. Query for and select the appropriate Siebel Mobile application user role.

       For example, query for the following: PH Pharma Sales Rep - US Sales.

    d. In the Views applet, add the User Profile Logs View to the selected application user role.

    e. In the Users applet, add users to the selected application user role.

       Doing this enables the User Profile Logs View for each user that you add.

    f. Select Clear Cache in the Responsibilities view.

3. Configure Log Events for logging in the Siebel Mobile application:

    a. Log in to the Siebel Mobile application with the User Profile Logs View responsibility.

       If you have not been assigned the User Profile Logs View responsibility (as shown in Step 2), then you will not be able to view log information.

    b. Tap Settings (the photo icon) on the application banner, and then select the Settings option.

    c. Tap Behavior, and then set Log Events to one of the values described in the following table.

Value	Description
Metadata Extraction	This log event option logs the following: ■ Server error messages in the metadata extraction. ■ The errors in parsing metadata.
Data Extraction - Basic	This log event option logs the following: ■ Server errors in the data extraction for full and incremental synchronization downloads. ■ The number of records for each business component. ■ The errors in the caching data.
Data Extraction - Detailed	This log event option logs the following during full and incremental synchronization downloads: ■ The user keys extracted for each business component.
UpSync	This log event option logs the details of records to be uploaded and all records that are uploaded.

Value	Description
Client System	This log event option logs the following: ■ Errors when navigating to different views within the application. ■ Errors during create, update, and delete operations. ■ Debug information for the following: ■ Create, update, and delete operations. ■ Successful inserts to synchronization, business component, and intersection tables. ■ Successful business component updates, and so on. ■ SQL queries performed on the Web database and the number of records affected.
All	Logs event and debug information for all of the following log event options combined: Metadata Extraction, Data Extraction - Basic, Data Extraction - Detailed, UpSync, and Client System.

4. Log out of the application and then log back in again for the changes to take effect.

Notice that after you log back in to the application, Log (the bug icon) appears on the application banner.

Clearing Log Information for Siebel Mobile Applications

Log information is stored locally in the browser cache. When local storage is full, the following message appears in the log console: Local storage is full. It is recommended that you clear log information on a regular basis to prevent the unnecessary usage of browser storage space. You must have a minimum of 50 megabytes (MB) of available storage on your mobile device at all times.

Before clearing the log information for Siebel Mobile applications, review the existing log information just in case you might want to save any of it. The following procedure assumes that logging has been enabled for the Siebel Mobile users as shown in "Enabling Logging for Siebel Mobile Application Users" on page 8-31.

To clear the log information for Siebel Mobile applications

1. Tap the bug icon on the application banner.

The log console opens showing all recent log event messages and debug information.

2. Tap clear to clear the log information.

All log information is deleted from the browser local storage.

Uploading Siebel Mobile Log Information to Siebel Server

The following procedure shows you how to upload Siebel Mobile log information to Siebel Server. This procedure assumes that logging has been enabled for Siebel Mobile users as shown in "Enabling Logging for Siebel Mobile Application Users" on page 8-31.

To upload Siebel Mobile log information to Siebel Server

1. Tap the bug icon on the application banner.

The log console opens showing all recent log event messages and debug information.

2. Tap Upload Logs to upload all log information to Siebel Server.

3. Siebel Server saves all log information that it receives in the `<server location>/log` folder:

   `<server location>/log/<user_id>/DMLog_<nodeid>_<timestamp>.log`

   where:

   - *<user_id>* indicates the ID of the logged in user.

   - *<nodeid>* indicates the client device. The node ID is generated when the user switches to offline mode. If the user does not switch to offline mode, then the log information is saved as follows: `DMLog_No-Node-ID_<timestamp>.log`.

   - *<timestamp>* indicates the date and time that the log was saved.

Saving Siebel Mobile Log Information

The following procedure shows you how to save Siebel Mobile log information. This procedure assumes that logging has been enabled for Siebel Mobile users as shown in "Enabling Logging for Siebel Mobile Application Users" on page 8-31.

To save Siebel Mobile log information

1. Tap the bug icon on the application banner.

   The log console opens showing all recent log event messages and debug information.

2. Tap anywhere in the log console, tap Select All, and then tap Copy.

3. Save the log information, for example, as follows:

   a. Open the Notes feature on your mobile device.

   b. Tap New to create a new note.

   c. Tap anywhere in the new note that opens, then tap Paste to paste the contents of the clipboard (that is, the log information that you copied in Step 2) into the note.

About Siebel Mobile Log API

The Siebel Mobile log function stores data locally in the browser cache. When the local browser storage is full, the log event messages and debug information for Siebel Mobile applications are no longer logged and the following error message appears in the console log:

```
Local storage is full.
```

Table 8–2 describes the Siebel Mobile log function in more detail. For information about troubleshooting Siebel Mobile disconnected application logging, see "Troubleshooting Your Siebel Mobile Disconnected Application" on page 3-21.

Table 8–2   Siebel Mobile Log Function

Item	Description
Function Name	`SiebelApp.S_App.LogOfflineEvent()`
In Parameters	The Siebel Mobile log function takes the following in-parameters:
	`message: string,` `params: string`

Table 8–2   (Cont.) Siebel Mobile Log Function

Item	Description
Out Parameter	The Siebel Mobile log function takes the following out parameter: `Type: void`
Description	This function takes two values (message and params) which are formatted and stored in the local browser storage. An error message appears (Local storage is full) in the console log when the local browser storage is full. Siebel stops logging error messages after this error message appears.

Example	`SiebelApp.S_App.LogOfflineEvent('%1 - %2:= %3', 'class1',`
	`'method1', 'data');`
	`//This will be logged as: class1 - method1:= data`

Process of Using Siebel Mobile Applications in Offline Mode

You can use Siebel Mobile applications in offline mode if your mobile device has a wireless network connection. In offline mode, your mobile device is not connected to the Siebel Server and you cannot synchronize any changes that you make while working in offline mode. You must switch back to online mode, and then synchronize the changes. To use Siebel Mobile applications in offline mode, perform the following tasks.

1. Log in to the Siebel Mobile application.

    For more information, see "Logging In to Siebel Mobile Applications" on page 8-2.

2. Switch your Siebel Mobile application to work in offline mode.

    For more information, see the following:

    - "Using the Airplane Icon on the Application Banner" on page 8-36
    - "Switching to Offline Mode for the First Time" on page 8-37
    - "About Switching to Offline Mode Subsequently" on page 8-37.

3. Modify the cached data in offline mode as required.

    For more information, see "Working in Offline Mode" on page 8-38.

4. Synchronize the changes that you made while working in offline mode with the Siebel Server.

    For more information, see the following:

    - "Synchronizing Data" on page 8-39
    - "Synchronization Icons" on page 8-40

5. Verify that the synchronization changes that you made while working in offline mode have been synchronized with the Siebel Server.

    For more information, see "Verifying Data Synchronization" on page 8-41.

6. Review the synchronization errors.

    For more information, see "Reviewing Synchronization Errors" on page 8-42.

Using the Airplane Icon on the Application Banner

The airplane icon on the application banner indicates whether the Siebel Mobile application can connect to and synchronize data with the Siebel Server. If the Siebel Mobile application can connect to and synchronize data with the Siebel Server, then the application is connected to the Siebel Server and in online mode. If the Siebel Mobile application cannot connect to and synchronize data with the Siebel Server, then the application is disconnected from the Siebel Server and in offline mode.

The airplane icon shows the state of the connection (online or offline) for Siebel Mobile applications. A gray airplane icon shown in Figure 8–5 indicates a connected or online state, where synchronization (data upload and download) between the Siebel Mobile application and Siebel Server takes place automatically.

Figure 8–5   Siebel Mobile Application: Gray Airplane Icon

A white airplane icon shown in Figure 8–6 indicates a disconnected or offline state, where synchronization (data upload and download) between the Siebel Mobile application and Siebel Server does not take place automatically. In this instance, you must manually upload or synchronize data between the Siebel Mobile application and Siebel Server by tapping the white airplane icon and selecting a reconnection option as required. For more information, see the following procedure.

Figure 8–6   Siebel Mobile Application: White Airplane Icon

To use the airplane icon

■ Tap the gray airplane icon on the application to go offline and work in disconnected mode. For more information, see the following topics:

– "Switching to Offline Mode for the First Time" on page 8-37

– "About Switching to Offline Mode Subsequently" on page 8-37

– "Working in Offline Mode" on page 8-38

■ Tap the white airplane icon on the application banner, and then select one of the following options as required:

– **Upload and Go Online.** Select this option to trigger a data upload and go online.

– **Sync and stay Offline.** Select this option to synchronizes data but remain in offline mode.

– **Upload Only and stay Offline.** Select to trigger a data upload only but remain in offline mode.

For more information, see "Synchronizing Data" on page 8-39.

Switching to Offline Mode for the First Time

Use the following procedure to switch to offline mode. When you switch to offline mode for the first time, a full data and metadata download is initiated from Siebel Server to the mobile device. But when you subsequently switch to offline mode, then either a full or an incremental synchronization process is initiated according to how the Siebel Mobile Always Full Sync system preference is set. For more information, see the following:

- "Configuring Synchronization for Siebel Mobile Disconnected Applications" on page 4-14

- "About Switching to Offline Mode Subsequently" on page 8-37

To switch to offline mode

1. Wait for the following data synchronization notification message:

   `Data is ready for download.`

2. Tap the gray airplane icon on the application banner to switch to offline mode.

   - A down arrow appears next to the gray airplane icon, which shows that the data and metadata is being downloaded to the mobile device.

   - A progress bar with a green line appears below the gray airplane icon, which shows the progress of the data and metadata download. When the progress bar is fully green, this indicates that the metadata has downloaded to the mobile device.

   For more information about the airplane icon, see "Using the Airplane Icon on the Application Banner" on page 8-36.

3. (Optional) Use the bug icon on the application banner to review the log event messages and debug information for the Siebel Mobile application as required. For more information, see "Siebel Mobile Application Logging" on page 8-31.

4. After the full data and metadata has downloaded to the mobile device, the Siebel Mobile application UI automatically refreshes and goes into offline mode.

   You are now in offline mode and disconnected from the Siebel Server. Notice that the gray airplane on the application banner changes to a white airplane to indicate a disconnected state. You can now modify the cached data while disconnected from the Siebel Server. For more information, see "About Switching to Offline Mode Subsequently" on page 8-37 and "Working in Offline Mode" on page 8-38.

About Switching to Offline Mode Subsequently

When you switch to offline mode for a second and subsequent time, then either a full or incremental synchronization process is initiated according to how the Siebel Mobile Always Full Sync system preference is set. Provided that network connectivity is available and a reconnection to Siebel Server can be made when you switch to offline mode for a second or subsequent time, note the following:

- If an incremental synchronization is initiated between Siebel Server and the mobile device, then all changes from the server database that were made by others are downloaded to update the local database on the mobile device. When the incremental synchronization process is complete, the mobile application device moves to offline mode and the user can work with the updated data.

- If any of the following situations occurred since the last offline data package was downloaded, then users are prompted to perform a full data and metadata download again. After the download is complete, the mobile device moves to offline mode and the user can work with the latest data.

  – The srf changes

  – The responsibility of the user changes

  – The position of the user changes

  – The data changes

  – The user node is re-extracted

  – A business component filter changes

  – A business object filter changes

- If network connectivity is unavailable or a reconnection to Siebel Server cannot be made when you switch to offline mode for a second and subsequent time, then the mobile device moves to offline mode and the user can work with the last data package that was downloaded.

- If network connectivity is unavailable or a connection to Siebel Server cannot be made when you log in to Siebel Mobile, then the application automatically launches in offline mode using the last data package that was downloaded (provided that one exists). The user works in offline mode with the last data package that was downloaded.

Related Topics

"Configuring Synchronization for Siebel Mobile Disconnected Applications" on page 4-14

"Modifying Notification Messages" on page 8-13

Working in Offline Mode

After the offline data package has downloaded successfully to your mobile device, you are ready to modify the cached data while disconnected. You can start working in offline mode straight away, or you can close the browser instance and work offline at a later time.

The following procedure shows you how to work in offline mode. The procedure assumes that you have already successfully downloaded the offline data package, and that you have closed the browser instance.

To work in offline mode

1. (Optional) Switch your mobile device to airplane mode as follows:

   a. Tap Settings on your mobile device.

   b. Set Airplane Mode to On.

   This is an optional step. Switching your mobile device to airplane mode disables the wireless communication abilities on your mobile device, and prevents a reconnection to the Internet.

2. Start a browser and log in to the Siebel Mobile application.

   Notice that the airplane icon on the application banner is white, which indicates that you are in a disconnected state.

3. Modify the cached data as required.

You can create, edit, update, and delete records for parent objects and associated related items, and so on. Notice that when you modify the cached data, a clock icon appears next to the white airplane icon to indicate that there are data changes waiting to be uploaded to the Siebel Server. For more information about the other synchronization icons that can appear next to the airplane icon, see "Synchronization Icons" on page 8-40.

4. When you have finished modifying the cached data, you can synchronize the changes made while working in offline mode.

For more information, see "Synchronizing Data" on page 8-39.

Synchronizing Data

If you have been using Siebel Mobile applications in offline mode, then you must manually synchronize the changes that were made while you were working in offline mode with the Siebel Server. The following procedure shows you how to manually synchronize the data changes made in offline mode.

To manually synchronize data

1. If required, switch your mobile device from airplane mode back to connected mode as follows:

   a. Tap Settings on your mobile device.

   b. Set Airplane Mode to Off.

2. Start a browser and log in to the Siebel Mobile application.

3. Tap the white airplane icon on the application banner, and then select one of the following options as required:

   ■ **Upload and Go Online.** Tap to automatically trigger a data upload and to go back online after the data upload has finished.

   _____

   Note : If the UI session has not expired before going offline, then selecting Upload and Go Online will use the same UI session to synchronize data. If the UI session has expired, then the Siebel login page appears prompting you to log in to the application again. After login, synchronization will automatically start and once complete, the UI refreshes.

   _____

   ■ **Sync and stay Offline.** Tap to synchronize data (that is, upload data changes made while working in the mobile application in offline mode and download any new changes made on the server) but remain working in offline mode.

   When this option is chosen, any records seen in offline mode are one of the following:

   – Records that have been newly modified (created, updated, or deleted) on the server since the last synchronization.

   – Records (user owned) that were successfully uploaded to the server and processed since the last synchronization.

   – Records that have just been uploaded to the server and are waiting to be processed.

■ **Upload Only and stay Offline.** Tap to trigger a data upload only but remain working in offline mode.

No matter what option you choose, the transactions are stored in a text file in the HHsync folder under `\USER_NAME\SYNC_NODE_ID\upsync\pretxn_x.txt` before being uploaded.

A white airplane icon indicates a disconnected or offline state, where synchronization (data upload and download) between the Siebel Mobile application and Siebel Server does not take place automatically. A clock next to the airplane icon indicates that there are changes waiting to be synchronized. For information about the other synchronization icons that can appear next to the airplane icon, see "Synchronization Icons" on page 8-40.

4. Close the browser instance.

5. Verify that all data has synchronized correctly.

For more information, see "Reviewing Synchronization Errors" on page 8-42.

Synchronization Icons

This topic describes the synchronization icons that can appear next to the airplane icon on the application banner of your Siebel Mobile disconnected application.

Figure 8–7 shows a blue down arrow. This synchronization icon indicates that a full metadata download is in progress.

Figure 8–7   Synchronization Icon: Full Metadata Download in Progress

Figure 8–8 shows a red triangle with an exclamation mark. This synchronization icon indicates that there has been a full metadata download failure.

Figure 8–8   Synchronization Icon: Data Download Failure

Figure 8–9 shows a clock with hands. This synchronization icon indicates that data changes are waiting to be synchronized.

Figure 8–9   Synchronization Icon: Data Synchronization Pending

Figure 8–10 shows a box with a check mark. This synchronization icon indicates that a data download is in progress.

Figure 8–10   Synchronization Icon: Data Download In Progress

Figure 8–11 shows a red circle with a horizontal bar. This synchronization icon indicates that there has been an incremental data download failure.

Figure 8–11   Synchronization Icon: Incremental Data Download Failure

Figure 8–12 shows a blue up arrow. This synchronization icon indicates that a data upload is in progress.

Figure 8–12   Synchronization Icon: Data Upload In Progress

Figure 8–13 shows a red triangle with an exclamation mark. This synchronization icon indicates that there has been a data upload failure.

Figure 8–13   Synchronization Icon: Data Upload Failure

Verifying Data Synchronization

Verify that the synchronization changes that were made while working in offline mode have been synchronized with the Siebel Server.

To verify data synchronization

1. Log in to the Siebel Mobile application.

    Typically, you log in to Oracle's Siebel Mobile applications in connected mode, where you are connected to the Siebel Server.

2. Verify that all changes that you made while working in offline mode have been synchronized with the Siebel Server and that you can now see them when connected to the Siebel Server.

    If you cannot see some changes, then review the synchronization errors as shown in "Reviewing Synchronization Errors" on page 8-42.

Reviewing Synchronization Errors

If conflicts or errors occur during synchronization, the Notifications feature lists all the synchronization errors, including summary information about the error. You can also review the respective synchronization log files in the Conflict - Administration screen. Use the following procedure to review the synchronization errors.

To review the synchronization errors

1. Log in to the Siebel Mobile application.

2. Tap Notification (the exclamation icon) on the application banner.

3. Review all the messages that have a *Sync Error*, *Data Sync*, or *Login* notification.

   For more information, see the following:

   - "Reviewing Notification Messages in Siebel Mobile" on page 8-11
   - "Obtaining Error Details from Synchronization Sessions" on page 4-20

Logging Out of Siebel Mobile

This topic describes how to log out of Siebel Mobile applications.

Note : Log out is not supported in offline mode.

To log out of Siebel Mobile applications

- Tap Settings (the photo icon) on the application banner, and then tap Logout.

Unsupported Siebel Mobile Features in Offline Mode

The features listed in this topic are not supported in offline mode. You must be connected to the Internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application:

- Directly add or create new records

  You cannot directly add or create new records using the double plus (++) icon in offline mode. In the case of child views where records are being associated, associating a downloaded record with a selected record using the plus (+) icon is supported in offline mode. For more information, see "Creating Records in Siebel Mobile" on page 8-8.

- "Searching for Records in Siebel Mobile" on page 8-9
- Using the cogwheel icon

  For more information, see "About the Cogwheel Icon in Siebel Mobile" on page 8-9

- "Creating Bookmarks in Siebel Mobile" on page 8-11
- "Modifying Notification Messages" on page 8-13
- "Configuring Application Settings for Siebel Mobile" on page 8-13
- "Displaying Location Details in Siebel Mobile" on page 8-17
- "Running Predefined Queries in Siebel Mobile" on page 8-18
- "Starting an External Application from Siebel Mobile" on page 8-20
- "Logging Out of Siebel Mobile" on page 8-42

- Use the following icons to make a selection or type some text: Phone, Email, Pin, or URl.

- Multiple record selection in list applets.

  > **Note :** Multiple record selection for associate applets only is supported in offline mode.

- Other features not supported in offline mode include:

  – Cascade delete

  – Currency pop-up controls

  – Default Applet Menu items

  – Dynamic drilldowns

  – Dynamic controls

  – Execution of joined fields

  – Inline query in list applets

  – MVG (multi-value group) fields. MVG fields are read-only in offline mode.

  – Thread bar.

  – Toggle applets.

  – The Back button to go to a previous page.

  – The Show More option in List applets is unavailable.

  – The User Settings view is unavailable.

- The expression parser is limited.

  The expression parser is used for parsing expressions such as those for field validations, pre-default and post-default properties, Business Component search specifications, and so on is limited.

  The expression parser does not support all the expressions that are supported by Siebel Server.

9

Using the Siebel Mobile Disconnected Application for Siebel Pharma

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Pharma can execute in online (connected) and offline (disconnected) mode. Tasks and features that are not supported in offline mode are listed. It includes the following topics:

- Using the Home Page for Siebel Pharma
- Managing Calls for Siebel Pharma
- Managing Accounts for Siebel Pharma
- Managing Contacts for Siebel Pharma
- Using the PCD Viewer in Siebel Mobile
- Task Flows for Siebel Pharma
- Unsupported Features in Offline Mode

> **Note:** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "Inline Editing" on page 8-7.

Using the Home Page for Siebel Pharma

The following procedures related to using the home page for Siebel Pharma are included in this topic:

- "Viewing Call Planning Information" on page 9-2
- "Scheduling Calls For Contacts and Accounts" on page 9-2

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

Viewing Call Planning Information

On the home page for Siebel Pharma, you can view the call planning information for contacts and accounts in the calendar.

> **Note:** Viewing calls in the calendar is similar to viewing activities in the calendar. For more information about using the calendar to view activities, see *Siebel Fundamentals for Siebel Open UI*.

To view the call planning information

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   ■ The calendar showing the call planning information in the right pane or work area.

   ■ The Contacts and Accounts list in the left pane. Tap Contacts or Accounts to expand the corresponding contacts or accounts list.

   > **Note:** You cannot perform the remaining steps in this task in offline mode.

2. On the calendar in the right pane, view the call planning information as follows:

   ■ Tap the left and right arrows to navigate across dates and view the calls scheduled on different dates.

   ■ Tap the daily or weekly calendar icon to switch between the daily and weekly view of calls scheduled.

   ■ Tap Today to see the calls scheduled for today's date.

3. On the calendar in the right pane, you can perform the following tasks:

   ■ Extend the duration of a call by tapping the border of the call and dragging it out.

   ■ Move a call by tapping the call, and then dragging and dropping it on a different time or date.

   ■ Tap a call on the calendar to drilldown and open the call details. For more information, see "Displaying Call Details" on page 9-4.

   ■ Schedule a call for a contact or an account. For more information, see "Scheduling Calls For Contacts and Accounts" on page 9-2.

Scheduling Calls For Contacts and Accounts

On the home page for Siebel Pharma, you can schedule calls for contacts and accounts in the calendar.

> **Note:** Scheduling calls in the calendar is similar to scheduling activities in the calendar. For more information about using the calendar to schedule activities, see *Siebel Fundamentals for Siebel Open UI*.

To schedule calls for contacts and accounts

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

    -   The calendar showing the call planning information in the right pane or work area.

    -   The Contacts and Accounts list in the left pane. Tap Contacts or Accounts to expand the corresponding contacts or accounts list.

        > **Note:** You cannot perform the remaining steps in this task in offline mode.

2. Schedule a new contact call as follows:

    a. Tap Contacts in the left pane to expand the contacts list, and then select a contact from the list.

    b. Drag and drop the selected contact onto the calendar in the right pane to schedule the new call.

    c. Drilldown on the new call to open it.

    d. Modify the call details as required. For more information, see "Modifying Call Information" on page 9-5,

    e. Modify the related items for the call as required. For more information, see Step 3. in "Displaying Call Details" on page 9-4.

3. Schedule a new account call as follows:

    a. Tap Accounts in the left pane to expand the accounts list, and then select a contact from the list.

    b. Drag and drop the selected account onto the calendar in the right pane to schedule the new call.

    c. Drilldown on the new call to open it.

    d. Modify the call details as required. For more information, see "Modifying Call Information" on page 9-5.

    e. Modify the related items for the call as required. For more information, see Step 3. in "Displaying Call Details" on page 9-4.

Managing Calls for Siebel Pharma

A *call* is a scheduled interaction that you have with a contact or an account.

The following procedures related to calls and call management are included in this topic:

-   "Displaying Call Details" on page 9-4

-   "Modifying Call Information" on page 9-5

-   "Modifying Attendee Information for a Call" on page 9-5

-   "Modifying Promotional Items for a Call" on page 9-7

-   "Modifying Samples for a Call" on page 9-8

-   "Modifying Product Details for a Call" on page 9-9

- "Viewing the Validation Results for a Call" on page 9-10
- "Adding Literature Information to a Call" on page 9-10
- "Viewing Presentation Detail Information for a Call" on page 9-11
- "Capturing the Electronic Signature for a Call" on page 9-11
- "Submitting a Call for Processing" on page 9-12

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

Displaying Call Details

You can display call details by using the calendar.

To display call details

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   - The calendar showing the call planning information in the right pane or work area.
   - The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   - The details for the selected call in the right pane or work area.
   - A list in the left pane in which you can select the related items for the call.

3. To view the related items for the selected call, tap the following names in the list in the left pane:

   - **Call Planning.** Shows the home page for Siebel Pharma where you can view the call planning information for and schedule new calls for contacts and accounts. For more information, see the following:

     – "Viewing Call Planning Information" on page 9-2

     – "Scheduling Calls For Contacts and Accounts" on page 9-2

   - **Attendees.** Shows the attendee information for the call. For more information, see "Modifying Attendee Information for a Call" on page 9-5.

   - **Promotional Items Dropped.** Shows the number of dropped promotional items for the call. For more information, see "Modifying Promotional Items for a Call" on page 9-7.

   - **Samples Dropped.** Shows the number of dropped samples for the call. For more information, see "Modifying Samples for a Call" on page 9-8.

   - **Product Details.** Shows the product details for the call. For more information, see "Modifying Product Details for a Call" on page 9-9.

   - **Validation Results.** Shows the validation results for the call. For more information, see "Viewing the Validation Results for a Call" on page 9-10.

   - **Literature.** Shows the literature information for the call. For more information, see "Adding Literature Information to a Call" on page 9-10.

- **Presentation Detail.** Shows the presentation detail information for the call. For more information, see "Viewing Presentation Detail Information for a Call" on page 9-11.

Modifying Call Information

Complete the following procedure to modify call information.

To modify call information

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   - The calendar showing the call planning information in the right pane or work area.

   - The Contacts and Accounts list in the left pane.

2. Update an existing call as follows:

   a. Tap a call on the Calendar in the right pane to open it and display the following:

      – The details for the selected call in the right pane or work area.

      – A list in the left pane in which you can select the related items for the call.

   b. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it. The following table describes the fields that you can modify.

Field Name	Description
Contact	Select a contact for the call. You must select either a contact in this field or an account in the Account field. You cannot select both a contact and an account for the call.
Account	Select an account for the call. You must select either an account in this field or a contact in the Contact field. You cannot select both an account and a contact for the call.
Address	Displays the primary address for the contact or account that you select. To select a different address, tap the Address field, and select the address from the list that appears. When you create a call in offline mode for a new contact or account, this field is not populated with the primary address. You must select the address from the list that appears.
Start Date	Select the call start date and time.
Call Duration	Select the number of minutes for the call duration.

3. To schedule a new call, see "Scheduling Calls For Contacts and Accounts" on page 9-2.

Modifying Attendee Information for a Call

Complete the following procedure to modify the attendee information for a call. An *attendee* is an individual who is present during a meeting or phone discussion for an account call. Attendee information applies to account calls, and not to contact calls. However, when you add an attendee to an account call, you create a contact call for the attendee.

To modify the attendee information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   ■ The calendar showing the call planning information in the right pane or work area.

   ■ The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   ■ The details for the selected call in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for the call.

3. Update an existing call attendee as follows:

   a. Tap Attendees in the list in the left pane.

   All the attendees associated with the call appear in the work area, and all details for the selected call appear above the Attendees list in the work area.

   b. Tap the attendee that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add an attendee to the call as follows:

   a. Tap Attendees in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Choose one or more attendees on the list that appears, and then tap OK.

   You can perform one of the following steps to filter the records in the list:

   – Tap All Contacts to show all of the contacts that are available.

   – Tap Affiliated Contacts to show only the affiliated contacts associated with the account for the call.

   Note: The search filter for affiliated contacts is not supported in offline mode.

5. Add promotional items and samples to the call and capture a signature for the call as follows:

   a. Tap Attendees in the list in the left pane, and then drilldown on the attendee Name.

   b. Add promotional items and samples to the call as required. For more information, see the following topics:

   – "Modifying Promotional Items for a Call" on page 9-7

   – "Modifying Samples for a Call" on page 9-8

   c. Capture a signature for the call as required. For more information, see "Capturing the Electronic Signature for a Call" on page 9-11.

Modifying Promotional Items for a Call

Complete the following procedure to modify the promotional items for a call. You give promotional items to the customer during the call. Given promotional items are dropped promotional items. Promotional items apply to contact or attendee calls, and not to account calls.

Before you submit a call for processing, you can modify the promotional item information for the call. You can give only products that meet the following criteria to the customer as promotional items:

- The products are allocated to the sales representative.

- The products are available in the inventory of the sales representative.

- The products are active on the current date.

To modify the promotional items for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   - The calendar showing the call planning information in the right pane or work area.

   - The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   - The details for the selected call in the right pane or work area.

   - A list in the left pane in which you can select the related items for the call.

3. Update an existing call promotional item as follows:

   a. Tap Promotional Items Dropped in the list in the left pane.

   All the promotional items associated with the call appear in the work area, and all details for the selected call appear above the Promotional Items Dropped list in the work area.

   b. Tap the promotional item that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add a promotional item to the call as follows:

   a. Tap Promotional Items Dropped in the list in the left pane, and then tap Add in the work area.

   b. Enter the quantity of the promotional item to give to the call customer in the Quantity field, and then tap OK.

   The following table describes the other fields.

Field Name	Description
Name	Displays the name of the promotional item.
Quantity	Type the quantity of the promotional item to give to the call customer.
Max Qty	Displays the maximum quantity of the promotional item that the sales representative can give to the call customer in the allocation period.
Available Qty	Displays the quantity of the promotional item that is currently available to the sales representative.

Modifying Samples for a Call

Complete the following procedure to modify the samples for a call. You give samples to the customer during the call. Given samples are dropped samples. Samples apply to contact or attendee calls, and not to account calls.

Before you submit a call for processing, you can modify the sample information for the call. You can give only products that meet the following criteria to the customer as samples:

- The products are allocated to the sales representative.

- The products are available in the inventory of the sales representative.

- The products are active on the current date.

To modify the samples for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   - The calendar showing the call planning information in the right pane or work area.

   - The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   - The details for the selected call in the right pane or work area.

   - A list in the left pane in which you can select the related items for the call.

3. Update an existing call sample as follows:

   a. Tap Samples Dropped in the list in the left pane.

      All the samples associated with the call appear in the work area, and all details for the selected call appear above the Samples Dropped list in the work area.

   b. Tap the sample that you want to update.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add a sample to the call as follows:

   a. Tap Samples Dropped in the list in the left pane, and then tap Add in the work area.

   b. Enter the quantity of the sample to give to the call customer in the Quantity field, and then tap OK.

      The following table describes the other fields.

Field Name	Description
Name	Displays the sample name.
Lot Number	Displays the lot number for the sample.
Expiry Date	Displays the date that the sample expires.
Quantity	Type the quantity of the sample to give to the call customer.

Modifying Product Details for a Call

Complete the following procedure to modify the product details for a call. Product details indicate the priority of each product associated with the call. You determine these priorities when you interact with the customer. After you add product details, a list of products in ascending order of priority appears when you tap Products Detailed for the call.

Before you submit a call for processing, you can modify the product details for the call. Only products with indications are available to associate with calls. An *indication* is the purpose or therapeutic area that a product drug addresses. The administrator associates product drugs with indications.

To modify the product details for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   ■ The calendar showing the call planning information in the right pane or work area.

   ■ The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   ■ The details for the selected call in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for the call.

3. Update an existing call product detail as follows:

   a. Tap Products Detailed in the list in the left pane.

   All the detail products associated with the call appear in the work area, and all details for the selected call appear above the Products Detailed list in the work area.

   b. Tap the product detail that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add a new product detail to the call as follows:

   a. Tap Products Detailed in the list in the left pane, and then tap Add in the work area.

   b. Choose a product from the list on the form that appears, enter a number to indicate the importance of the product in the Priority field, and then tap OK.

   Specify product priority in sequential order. The following table describes the fields.

Field Name	Description
Name	Displays the product name.
Priority	Type a number to indicate the importance of each product.
Indication	Displays the purpose or therapeutic area that the product drug addresses. Values for an indication include the following: Allergy, Asthma, Arrhythmia, Heart Failure, Syncope, and Other.

Viewing the Validation Results for a Call

After you capture the electronic signature for a call or submit the call for processing, validation results are automatically generated for the call. Check these validation results to determine any errors in the call data. For example, the validation results might show a warning message indicating that you entered a quantity that exceeds the maximum quantity of samples that you can give to the customer for the call. You must resolve any errors in the validation results before proceeding with a call. If there are warning errors for a call, you can sign or submit the call for processing. But if there are any unresolved validation errors for a call, then you will be unable to sign or submit the call for processing.

To view the validation results for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

    ■ The calendar showing the call planning information in the right pane or work area.

    ■ The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

    ■ The details for the selected call in the right pane or work area.

    ■ A list in the left pane in which you can select the related items for the call.

3. Tap Validation Results in the list in the left pane.

    All the validation results and any errors in the call data appear in the work area, and all details for the selected call appear above the Validation Results list in the work area.

Adding Literature Information to a Call

Complete the following procedure to add literature information to a call. Literature information includes sales and marketing literature, such as product brochures, white papers, and data sheets. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

> **Note:** For more information about literature in Siebel CRM, see the chapter about literature administration in *Siebel Applications Administration Guide*.

To add literature information to a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

    ■ The calendar showing the call planning information in the right pane or work area.

    ■ The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

    ■ The details for the selected call in the right pane or work area.

    ■ A list in the left pane in which you can select the related items for the call.

3. Add literature to the call as follows:

    a. Tap Literature in the list in the left pane.

    All the literature associated with the call appears in the work area, and all details for the selected call appear above the Literature list in the work area.

    b. Tap the plus icon (+) in the work area, choose the literature item on the list that appears, and then tap OK.

Viewing Presentation Detail Information for a Call

Complete the following procedure to view the presentation detail information for a call. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

To view the presentation detail information for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   - The calendar showing the call planning information in the right pane or work area.

   - The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   - The details for the selected call in the right pane or work area.

   - A list in the left pane in which you can select the related items for the call.

3. Tap Presentation Detail in the list in the left pane.

   All the presentation items (messaging plans, messaging plan items, and related messaging plan items) associated with the call appear in the work area, and all details for the selected call appear above the Presentation Details list in the work area.

   The following table describes the presentation detail information.

Field Name	Description
Message	The name of the presentation item (messaging plan, messaging plan item, or related messaging plan item) that was shown during the call.
Response	The response rating recorded for the presentation item (messaging plan, messaging plan item, or related messaging plan item).
Duration	The duration in seconds that the presentation item (messaging plan, messaging plan item, or related messaging plan item) was shown during the call.
Sequence	Tracks the message plan items that are detailed and submitted for the call.

Related Topics:

"Using the PCD Viewer in Siebel Mobile" on page 9-28

"Recording Responses to Presentations in Siebel Mobile" on page 9-35

Capturing the Electronic Signature for a Call

After you enter all of the necessary information for a call, including information about dropped samples, you capture the signature of the contact for the call. You capture this signature to verify the contact's receipt of samples. After you obtain this signature, you cannot update the dropped samples associated with it.

To capture the electronic signature for a call

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   ■ The calendar showing the call planning information in the right pane or work area.

   ■ The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   ■ The details for the selected call in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for the call.

3. Tap Sign in the work area.

   Information about the contact for the call and about the dropped samples for the call appears.

4. Capture the signature of the contact in the signature input box.

5. If you make a mistake when capturing the signature, do one of the following as required:

   ■ Tap Clear to clear the signature and start again.

   ■ Tap Cancel to exit the call signing process.

6. Tap the save icon when finished.

   You can now submit the call for processing.

Submitting a Call for Processing

After you complete all of the information for the call, and after you capture the signature for the disbursed samples, you submit the call for processing. You can submit only calls that have a Status field of Planned or Signed. At least one disbursed sample must be associated with a call before you can submit it.

You submit a call for processing to close the call. After you submit a call, you can review but not update the call. The inventory of the sales representative is decreased by the disbursed samples and disbursed promotional items for the call.

To submit a call for processing

1. Tap the Side Menu icon on the application banner, and then tap Calls to display the following:

   ■ The calendar showing the call planning information in the right pane or work area.

   ■ The Contacts and Accounts list in the left pane.

2. Tap a call on the calendar in the right pane to open it and display the following:

   ■ The details for the selected call in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for the call.

3. Tap Submit to submit the call for processing.

   The Status field for the call changes to Submitted. You cannot resubmit a call with a Status field value of Submitted. The call is now closed and locked.

Managing Accounts for Siebel Pharma

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

The following procedures related to accounts and account management are included in this topic:

- "Displaying Account Details" on page 9-13
- "Modifying Account Information" on page 9-14
- "Modifying Contact Information for an Account" on page 9-14
- "Modifying Call Information for an Account" on page 9-15
- "Modifying Address Information for an Account" on page 9-16
- "Modifying Contact Affiliation Information for an Account" on page 9-16
- "Modifying Account Relationship Information for an Account" on page 9-17
- "Modifying Attachment Information for an Account" on page 9-18

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

Displaying Account Details

You can display account details by using the Accounts list.

To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

    - The Accounts list and details for the selected account in the right pane or work area.

    - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

    All details for the selected account appear below the list in the work area.

3. To view the related items for the selected account, tap the following names in the list in the left pane:

    - **Contacts.** Shows the contact information for the account. For more information, see "Modifying Contact Information for an Account" on page 9-14.

    - **Calls.** Shows the call information for the account. For more information, see "Modifying Call Information for an Account" on page 9-15.

    - **Addresses.** Shows the address information for the account. For more information, see "Modifying Address Information for an Account" on page 9-16.

    - **Contact Affiliations.** Shows the contact affiliation information for the account. For more information, see "Modifying Contact Affiliation Information for an Account" on page 9-16.

- **Account Relationships.** Shows the account relationship information for the account. For more information, see "Modifying Account Relationship Information for an Account" on page 9-17.

- **Attachments.** Shows the attachments for the account. For more information, see "Modifying Attachment Information for an Account" on page 9-18.

Modifying Account Information

Complete the following procedure to modify account information.

To modify account information

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

    - The Accounts list and details for the selected account in the right pane or work area.

    - A list in the left pane in which you can select the related items for accounts.

2. Update an existing account as follows:

    a. Tap an account in the Accounts list.

    All details for the selected account appear below the list in the work area.

    b. Tap the record field that you want to update, and update the field value.

    You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new account as follows:

    a. Tap the plus (+) icon in the work area.

    b. Enter the information for the new account in the fields that appear, and then tap the save icon when finished.

Modifying Contact Information for an Account

Complete the following procedure to modify the contact information for an account.

To modify the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

    - The Accounts list and details for the selected account in the right pane or work area.

    - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

    All details for the selected account appear below the list in the work area.

3. Update an existing account contact as follows:

    a. Tap Contacts in the list in the left pane.

    All the contacts associated with the account appear in the work area, and all details for the selected account appear above the Contacts list in the work area.

    b. Tap the contact that you want to update.

    c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add an existing contact to the account as follows:

   a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Choose the contact on the list that appears, and then tap OK.

5. Create a new account contact as follows:

   a. Tap Contacts in the list in the left pane, tap the plus (+) icon in the work area, and then tap the plus (+) icon on the list that appears.

   b. Enter the information for the new contact in the fields that appear, and then tap the save icon when finished.

Modifying Call Information for an Account

Complete the following procedure to modify the call information for an account. You can update only calls that are not yet submitted for processing.

To modify the call information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the right pane or work area.

   - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Update an existing account call as follows:

   a. Tap Calls in the list in the left pane.

   All the calls associated with the account appear in the work area, and all details for the selected account appear above the Calls list in the work area.

   b. Tap the call that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new account call as follows:

   a. Tap Calls in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new call in the fields that appear, and then tap the save icon when finished.

   The following table describes the fields.

Field Name	Description
Account	Displays the account associated with the call.
Address	Displays the primary address for the account. To select a different address, tap the Address field, and select the address from the list that appears.

Field Name	Description
Type	Select the type of call.
Start Date	Select the start date and time of the call.
Call Duration	Select the number of minutes for the call duration.
Comment	Type any necessary comment about the call.

Modifying Address Information for an Account

Complete the following procedure to modify the address information for an account.

To modify the address information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   ■ The Accounts list and details for the selected account in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Update an existing account address as follows:

   a. Tap Addresses in the list in the left pane.

   All the addresses associated with the account appear in the work area, and all details for the selected account appear above the Addresses list in the work area.

   b. Tap the address that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add an existing address to the account as follows:

   a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Choose the address on the list that appears, and then tap OK.

   Note: You cannot directly create new address records for accounts in offline mode. In the case of child views where records are being associated, associating a downloaded address with a selected account is supported in offline mode.

Modifying Contact Affiliation Information for an Account

Complete the following procedure to modify the contact affiliation information for an account. You can also affiliate accounts with a contact. For more information, see "Modifying Account Affiliation Information for a Contact" on page 9-25.

To modify the contact affiliation information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

- The Accounts list and details for the selected account in the right pane or work area.

- A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Update an existing contact affiliation as follows:

   a. Tap Affiliations in the list in the left pane.

      All the affiliations associated with the account appear in the work area, and all details for the selected account appear above the Affiliations list in the work area.

   b. Tap the affiliation that you want to update.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new contact affiliation as follows:

   a. Tap Affiliations in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new affiliation in the fields that appear, and then tap the save icon when finished.

      The following table describes the fields. Note that when you create a new or delete an existing contact affiliation, that contact appears on or is removed from the list of contacts associated with the account.

Field Name	Description
Last Name	Select the contact.
First Name	Displays the first name of the contact that you select.
Start Date	Select the start date that the contact is affiliated with the account.
Primary Specialty	Type the primary speciality for the contact.
Email	Displays the email address of the contact that you select.
Direct	Select this check box to route the profile data for the contact to all members of the account team. Clear this check box to route the profile data for the contact only to members of the account team who are assigned to the contact.

Modifying Account Relationship Information for an Account

Complete the following procedures to modify the account relationship information for an account. This information denotes the relationship between the account and another account.

To modify the account relationship information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the right pane or work area.

   - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Update an existing account relationship as follows:

   a. Tap Relationships in the list in the left pane.

      All the relationships associated with the account appear in the work area, and all details for the selected account appear above the Relationships list in the work area.

   b. Tap the relationship that you want to update.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new account relationship as follows:

   a. Tap Relationships in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new relationship in the fields that appear, and then tap the save icon when finished.

      The following table describes the fields.

Field Name	Description
This Account	Displays this account.
Other Account	Select an account to associate with this account.
Relationship	Select the relationship that the other account has with this account.
Site	Displays the site for the other account that you select.

Modifying Attachment Information for an Account

The attachment feature in the Siebel Mobile application for Siebel Pharma allows you to associate an attachment with individual account records. The following procedure shows you how to modify the attachment information for an account, including how to attach files (such as, Microsoft Outlook email messages, Microsoft Word documents, image files, and videos) and URL addresses to account records using the New File and New URL links respectively. Note the following:

- With iOS devices (iPad or iPhone), you can only attach files from the gallery or by using the camera on the mobile device to take a photo or record a video.

- With non-iOS devices (Samsung Galaxy tablets and smartphones), you can choose to attach files using applications such as Bluetooth file transfer or the file browser, provided that Siebel Mobile has been integrated with the file system on the mobile device. If the Siebel Mobile application is not integrated with the file system on your mobile device, then you will not be able to upload and download attachment files.

> **Note :** The attachment functionality is supported both in online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app from the App Store or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container (Siebel app) for iPad and iPhone devices. For more information, see "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22, "Managing Attachment Downloads Using the Siebel App" on page 8-29 and "Integrating Siebel Mobile with Native Device Features" on page 8-21.

To modify the attachment information (file or URL) for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the right pane or work area.

   - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Update an existing attachment (file or URL) as follows:

   a. Tap Attachment in the list in the left pane.

   All the attachments associated with the account appear in the work area, and all details for the selected account appear above the Attachments list in the work area.

   b. Tap the attachment that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. If using an iOS device (iPad or iPhone), then attach files and open attachment files as follows:

   a. To attach an existing file from the gallery:

   – Tap Attachment in the list in the left pane, and then tap New File in the work area.

   – Tap Choose Existing, select an existing file to attach to the record, and then tap OK.

   b. To attach a new photo or video:

   – Tap Attachment in the list in the left pane, and then tap New File in the work area.

   – Tap Take Photo or Video, take an instant photo or record an instant video and then tap OK to attach the photo or video to the record.

   c. To open an attachment file in a new window, tap the attachment name link.

5. If using a non-iOS device, then attach files and open attachment files as follows:

   a. To upload a new attachment file to Siebel Server from a mobile device:

   – Tap Attachment in the list in the left pane, and then tap New File in the work area.

   – Browse to and select the file that you want to upload, and then tap OK.

   b. To download an attachment file from Siebel Server to a mobile device:

   – Tap Attachment in the list in the left pane, and then tap the down arrow next to the attachment name in the work area.

   – Tap Download. The attachment is saved to the Downloads folder on the mobile device.

   c. To open an attachment file, tap the down arrow next to the attachment name and then tap Open.

   The attachment opens in a new window.

6. Attach a new URL address as follows:

   a. Tap Attachment in the list in the left pane, and then tap New URL in the work area.

   b. Type the URL address in the URL field, and then tap Add.

   c. To navigate to an existing URL address, tap the URL attachment name link.

Managing Contacts for Siebel Pharma

A *contact* is an individual with whom your company conducts business or expects to conduct business in the future. It can be an employee of another company, an independent consultant, a vendor, or an acquaintance.

The following procedures related to contacts and contact management are included in this topic:

- "Displaying Contact Details" on page 9-21

- "Modifying Contact Information" on page 9-21

- "Modifying Call Information for a Contact" on page 9-22

- "Modifying Address Information for a Contact" on page 9-23

- "Modifying Best Time Information for a Contact" on page 9-23

- "Modifying State License Information for a Contact" on page 9-24

- "Modifying Account Affiliation Information for a Contact" on page 9-25

- "Modifying Contact Relationship Information for a Contact" on page 9-26

- "Modifying Attachment Information for a Contact" on page 9-27

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Life Sciences Guide* and *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Pharma.

Displaying Contact Details

You can display contact details by using the Contacts list.

To display contact details

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   - The Contacts list and details for the selected contact in the right pane or work area.

   - A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. To view the related items for the selected contact, tap the following names in the list in the left pane:

   - **Calls.** Shows the calls for the contact. For more information, see "Modifying Call Information for a Contact" on page 9-22.

   - **Addresses.** Shows the address information for the contact. For more information, see "Modifying Address Information for a Contact" on page 9-23.

   - **Best Times.** Shows the best-time-to-call information for the contact. For more information, see "Modifying Best Time Information for a Contact" on page 9-23.

   - **State Licenses.** Shows the state license information for the contact. For more information, see "Modifying State License Information for a Contact" on page 9-24.

   - **Account Affiliations.** Shows the account affiliation information for the contact. For more information, see "Modifying Account Affiliation Information for a Contact" on page 9-25.

   - **Contact Relationships.** Shows the contact relationship information for the contact. For more information, see "Modifying Contact Relationship Information for a Contact" on page 9-26.

   - **Attachments.** Shows the attachments for the account. For more information, see "Modifying Attachment Information for a Contact" on page 9-27.

Modifying Contact Information

Complete the following procedure to modify contact information.

To modify contact information

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   - The Contacts list and details for the selected contact in the right pane or work area.

   - A list in the left pane in which you can select the related items for contacts.

2. Update an existing contact as follows:

   a. Tap a contact in the Contacts list.

      All details for the selected contact appear below the list in the work area.

   b. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new contact as follows:

   a. Tap the plus (+) icon in the work area.

   b. Enter the information for the new contact in the fields that appear, and then tap the save icon when finished.

Modifying Call Information for a Contact

Complete the following procedure to modify the call information for a contact. You can update only calls that are not yet submitted for processing.

To modify the call information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   ■ The Contacts list and details for the selected contact in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. Update an existing contact call as follows:

   a. Tap Calls in the list in the left pane.

      All the calls associated with the contact appear in the work area, and all details for the selected contact appear above the Calls list in the work area.

   b. Tap the call that you want to update.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new contact call as follows:

   a. Tap Calls in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new call in the fields that appear, and then tap the save icon when finished.

      The following table describes the fields.

Field Name	Description
Name	Displays the contact associated with the call.
Address	Displays the primary address for the contact. To select a different address, tap the Address field, and select the address from the list that appears.
Type	Select the type of call.
Start Date	Select the start date and time of the call.
Call Duration	Select the number of minutes for the call duration.
Comment	Type any necessary comment about the call.

Modifying Address Information for a Contact

Complete the following procedure to modify the address information for a contact.

To modify the address information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   ■ The Contacts list and details for the selected call in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. Update an existing contact address as follows:

   a. Tap Addresses in the list in the left pane.

   All the addresses associated with the contact appear in the work area, and all details for the selected contact appear above the Addresses list in the work area.

   b. Tap the address that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add an existing address to the contact as follows:

   a. Tap Addresses in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Choose the address on the list that appears, and then tap OK.

   > **Note:** You cannot directly create new address records for contacts in offline mode. In the case of child views where records are being associated, associating a downloaded address with a selected contact is supported in offline mode.

Modifying Best Time Information for a Contact

Complete the following procedure to modify the best-time-to-call information for a contact. This information typically applies to a contact who is a physician or another health-care provider. It is associated with an address for the contact.

> **Note:** The best-time slot for a contact does not extend after 12:00 P.M. for a specific day. For example, if you create a best-time slot for a contact from 9:00 to 11:00 P.M, and if you change it to start at 11:00 P.M, then the extended slot does not extend to the next day. The extended slot starts at 11:00 P.M. and ends at 12:00 P.M, and not at 1:00 A.M. on the next day.

To modify the best time information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

- ■ The Contacts list and details for the selected contact in the right pane or work area.

- ■ A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. Update an existing contact best-time as follows:

   a. Tap Best Times in the list in the left pane.

      All the best times associated with the contact appear in the work area, and all details for the selected contact appear above the Best Times list in the work area.

   b. Tap the best time that you want to update.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new contact best-time as follows:

   a. Tap Best Times in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new best time in the fields that appear, and then tap the save icon when finished.

Modifying State License Information for a Contact

Complete the following procedure to modify the state license information for a contact. This information typically applies to a contact who is a physician or another health-care provider.

To modify the state license information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   - ■ The Contacts list and details for the selected contact in the right pane or work area.

   - ■ A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. Update an existing contact state license as follows:

   a. Tap State Licenses in the list in the left pane.

      All the state licenses associated with the contact appear in the work area, and all details for the selected contact appear above the Licenses list in the work area.

   b. Tap the state license that you want to update.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new contact state license as follows:

a. Tap State Licences in the list in the left pane, and then tap the plus (+) icon in the work area.

b. Enter the information for the new state license in the fields that appear, and then tap the save icon when finished.

The following table describes the fields.

Field Name	Description
State	Select the state or jurisdiction in the United States associated with the license number. If the jurisdiction is not in the United States, then this field is not required.
License Number	Type the license number.
Status	Select the status of the license, which can be Active or Inactive.
Expiry Date	Select the date when the license expires.

Modifying Account Affiliation Information for a Contact

Complete the following procedure to modify the account affiliation information for a contact. You can set up such an affiliation for call-reporting purposes. You can also affiliate contacts with an account. For more information, see "Modifying Contact Affiliation Information for an Account" on page 9-16.

To modify the account affiliation information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

- The Contacts list and details for the selected contact in the right pane or work area.

- A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

All details for the selected contact appear below the list in the work area.

3. Update an existing account affiliation as follows:

a. Tap Affiliations in the list in the left pane.

All the affiliations associated with the contact appear in the work area, and all details for the selected contact appear above the Affiliations list in the work area.

b. Tap the affiliation that you want to update.

c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new account affiliation as follows:

a. Tap Affiliations in the list in the left pane, and then tap the plus (+) icon in the work area.

b. Enter the information for the new affiliation in the fields that appear, and then tap the save icon when finished.

The following table describes the fields.

Field Name	Description
Account	Select the account.
Account Type	Displays
Site	Displays the site for the account that you select.
Start Date	Select the start date that the account is affiliated with the contact.
End Date	Select the end date that the account is affiliated with the contact.
Comments	Type any necessary comments for the affiliated account.

Modifying Contact Relationship Information for a Contact

Complete the following procedure to modify the contact relationship information for a contact. This information denotes the relationship or role that exists between the contact and another contact.

To modify the contact relationship information for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   ■ The Contacts list and details for the selected contact in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. Update an existing contact relationship as follows:

   a. Tap Relationships in the list in the left pane.

   All the relationships associated with the contact appear in the work area, and all details for the selected contact appear above the Relationships list in the work area.

   b. Tap the relationship that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add a contact relationship as follows:

   a. Tap Relationships in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Choose the contact on the list that appears, and then tap OK.

   c. Tap the Relationship Type field, update the field value, and then tap the save icon when finished.

Modifying Attachment Information for a Contact

The attachment feature in the Siebel Mobile application for Siebel Pharma allows you to associate an attachment with individual contact records. The following procedure shows you how to modify the attachment information for a contact, including how to attach files (such as, Microsoft Outlook email messages, Microsoft Word documents, image files, and videos) and URL addresses to contact records using the New File and New URL links respectively. Note the following:

- With iOS devices (iPad or iPhone), you can only attach files from the gallery or by using the camera on the mobile device to take a photo or record a video.

- With non-iOS devices (Samsung Galaxy tablets and smartphones), you can choose to attach files using applications such as Bluetooth file transfer or the file browser, provided that Siebel Mobile has been integrated with the file system on the mobile device. If the Siebel Mobile application is not integrated with the file system on your mobile device, then you will not be able to upload and download attachment files.

Note : The attachment functionality is supported both in online (connected) and offline (disconnected) mode. In disconnected mode, attachments are supported when customers download the Siebel app from the App Store or use the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile Application Container (Siebel app) for iPad and iPhone devices. For more information, see "Downloading and Installing the Siebel Mobile Application Container (Siebel App)" on page 8-22, "Managing Attachment Downloads Using the Siebel App" on page 8-29 and "Integrating Siebel Mobile with Native Device Features" on page 8-21.

To modify the attachment information (file or URL) for a contact

1. Tap the Side Menu icon on the application banner, and then tap Contacts to display the following:

   - The Contacts list and details for the selected contact in the right pane or work area.

   - A list in the left pane in which you can select the related items for contacts.

2. Tap a contact in the Contacts list.

   All details for the selected contact appear below the list in the work area.

3. Update an existing attachment (file or URL) as follows:

   a. Tap Attachment in the list in the left pane.

      All the attachments associated with the contact appear in the work area, and all details for the selected contact appear above the Attachments list in the work area.

   b. Tap the attachment that you want to update in the work area.

   c. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

      For example, you can change the attachment name and add comments. Note that if you edit the attachment name inline, then your changes are saved when you step off the record in the Siebel Mobile application.

4. If using an iOS device (iPad or iPhone), then attach files and open attachment files as follows:

    a. To attach an existing file from the gallery:

- Tap Attachment in the list in the left pane, and then tap New File in the work area.

- Tap Choose Existing, select an existing file to attach to the record, and then tap OK.

    b. To attach a new photo or video:

- Tap Attachment in the list in the left pane, and then tap New File in the work area.

- Tap Take Photo or Video, take an instant photo or record an instant video and then tap OK to attach the photo or video to the record.

    c. To open an attachment file, tap the attachment name link.

    The attachment opens in a new window.

5. If using a non-iOS device, then attach files and open attachment files as follows:

    a. To upload a new attachment file to Siebel Server from a mobile device:

- Tap Attachment in the list in the left pane, and then tap New File in the work area.

- Browse to and select the file that you want to upload, and then tap OK.

    b. To download an attachment file from Siebel Server to a mobile device:

- Tap Attachment in the list in the left pane, and then tap the down arrow next to the attachment name.

- Tap Download. The attachment is saved to the Downloads folder on the mobile device.

    c. To open an attachment file, tap the down arrow next to the attachment name and then tap Open.

    The attachment opens in a new window.

6. Attach a new URL address as follows:

    a. Tap Attachment in the list in the left pane, and then tap New URL in the work area.

    b. Type the URL address in the URL field, and then tap Add.

    c. To navigate to an existing URL address, tap the URL attachment name link.

Using the PCD Viewer in Siebel Mobile

The Personalized Content Delivery Viewer is available in Siebel Pharma and by default for Calls in the Siebel Mobile application for Siebel Pharma. In the Siebel Mobile application for Siebel Pharma, you must start the viewer by selecting the Detail button. However, you can use the PCD Viewer on any other applet in the mobile application provided that you configure the Detail button for the applet. For more information about configuring the Detail button for applets in general in Siebel Mobile, see the topic about configuring interactive detailing in *Configuring Siebel Open UI*.

You use the PCD Viewer in Siebel Mobile and Siebel CRM to deliver personalized content to customers, to present information about products to customers, and to obtain feedback from customers about product presentations and personalized content delivered.

> **Note:** For Siebel Mobile, the PCD Viewer is supported only if using the Siebel Mobile Archive MAA file to create and deploy a customized Siebel Mobile app for iPad or iPhone devices. The Detail button will be enabled and available in the Siebel Mobile Application Container (Siebel app) only. The Detail button will be unavailable and disabled in the browser. For more information about the Siebel Mobile Application Container, see Downloading and Installing the Siebel Mobile Application Container (Siebel App).

Before using the PCD Viewer in Siebel Mobile, do the following:

- Plan for presentation delivery and review any existing call presentation information.

  For more information, see "Viewing Presentation Detail Information for a Call" on page 9-11.

- Create appropriate literature records in Siebel CRM.

  For more information, see "Creating Literature Records in Siebel CRM" on page 9-29.

- Associate literature with messaging plans in Siebel CRM as required.

  For more information, see "Associating Literature with Messaging Plans in Siebel CRM" on page 9-31.

- Define access to, release, and revise messaging plans in Siebel CRM as required.

  For more information, see "Defining Access to, Releasing, and Revising Messaging Plans in Siebel CRM" on page 9-32.

To deliver a presentation in Siebel Mobile using the PCD Viewer, see the following:

- "Showing Presentations in Siebel Mobile" on page 9-34
- "Recording Responses to Presentations in Siebel Mobile" on page 9-35

Creating Literature Records in Siebel CRM

The following procedure shows you how to create literature records in Siebel CRM, including how to attach a thumbnail image to a literature record. The following file types are supported: GIF, JPEG, JPG, MP4, PDF, PNG, HTML, and ZIP.

> **Note:** ZIP files are generally used to upload HTML files and their related content since individual files cannot be attached together.

For more information about working with literature in Siebel CRM, see the chapter about literature administration in *Siebel Applications Administration Guide*.

To create literature records in Siebel CRM

1. Log in to the Siebel business application.

2. Navigate to the Administration - Document screen, then the Literature view.

3. Create a new literature record of type Message as follows:

   a. Click New File.

   b. Browse to and select a file from your local drive, click Open, and then attach the file as follows:

     – Select the File Name field.

     – Click Browse on the Add Attachment pop-up that appears.

     – Select the file that you want to attach.

     The name of the file attachment appears in the Name and File Name fields.

   c. Enter a description of the file in the Description field.

     For example, enter HTML if this is an HTML ZIP file.

   d. In the Literature Type field, select Message.

   e. Enter the Release Date and the Expiration Date in the appropriate fields.

     The release date must be less than today's date and the expiration date must be greater than today's date.

   f. If the Unzip on download field is enabled (set to True), then the zip file is downloaded in offline mode, unzipped, and its contents are available to users to view in the PCD Viewer. If the Unzip on download field is disabled (set to False), then the zip file is downloaded only - the zip file will not be unzipped and users will not be able to view the zip file items in the PCD Viewer.

   g. Step off the record to save it.

4. Create a new literature record of type Thumbnail Image as follows:

   a. Click New File.

   b. Browse to and select a file from your local drive, click Open, and then attach the file as follows:

     – Select the File Name field.

     – Click Browse on the Add Attachment pop-up that appears.

     – Select the file that you want to attach.

   c. Enter a description of the file in the Description field.

   d. In the Literature Type field, select Thumbnail Image.

   e. The release and expiration dates are not required.

   f. Step off the record to save it.

5. Attach a thumbnail image to a literature record as follows:

   a. Create two literature records, one of type Message and the other of type Thumbnail Image as shown in Step 3. and Step 4.

   b. Query for the literature record of type Message where you want to attach the thumbnail image.

   c. In the Thumbnail Image field, select the image that you want to attach, and then click OK.

   d. Step off the record to save the changes.

Associating Literature with Messaging Plans in Siebel CRM

The following procedure shows you how to associate literature with messaging plans in Siebel CRM. The process involves adding presentation items (or messaging plan items) to messaging plans and then related messages to presentation items as required. For more information about working with messaging plans in Siebel CRM, see the chapter about using personalized content delivery in *Siebel Life Sciences Guide*.

To associate literature with messaging plans in Siebel CRM

1. Log in to the Siebel business application.

2. Navigate to the Messaging Plans screen, then the Messaging Plan List view.

3. If required, create a new messaging plan as follows:

   a. Click New, enter a name for the new messaging plan in the Name field, and then select a product in the Products field.

      The product that you select must be associated with the user, otherwise the messaging plan will not be visible to the user.

   b. Complete the remaining fields as required:

      – **Disable Menu Bar.** Select this check box to disable the header navigation bar in the PCD Viewer. For more information about navigating the PCD Viewer, see "Showing Presentations in Siebel Mobile" on page 9-34.

      – **Disable Navigation Bar.** Select this check box to disable the Next and Previous arrows and the footer navigation bar in the PCD Viewer. For more information about navigating the PCD Viewer, see "Showing Presentations in Siebel Mobile" on page 9-34.

      – **Enable Direct Launch.** Select this check box to enable presentations to be started from any presentation item. In this case, the presentation will start showing in the PCD Viewer with the selected item and you must navigate back to see any preceding items in the presentation. For more information about navigating the PCD Viewer, see "Showing Presentations in Siebel Mobile" on page 9-34.

      – **Disable Response.** Select this check box to make the capturing of customer feedback to presentations optional. To enforce the mandatory capture of customer feedback, then do not select this check box. For more information about capturing customer feedback, see "Recording Responses to Presentations in Siebel Mobile" on page 9-35.

   c. Navigate away from the record to save your changes to it.

4. Associate literature with messaging plans as follows:

   a. Select the messaging plan to which you want to add literature by clicking the messaging plan name link in the Name field.

   b. Select the Presentation Items tab, click New, and then select a message in the Name field.

   c. Complete the remaining fields as required:

      – **Sequence.** Enter an integer value in to the Sequence field to indicate the order where you want the presentation item to appear in the presentation (1 indicates first, 2 indicates second, 3 indicates third position, and so on).

      – **Status.** Select either Show or Hide in the Status field. Select Show to make the presentation item available when delivering the presentation in the

PCD Viewer. Select Hide to hide the presentation item when delivering the presentation in the PCD Viewer.

If the message that you selected in Step 4b. is in a ZIP file, then complete the following fields:

– **Content.** Type in the name of the HTML file to show in the PCD Viewer. If you do not specify a file name, then the ZIP file's index.html file is shown by default.

– **Thumbnail Image.** Type in the name of the thumbnail image to show in the PCD Viewer. Note that the image must be present in the HTML ZIP file.

d. Step off the record to save it.

e. Add related messages to presentation items as follows:

– Select the presentation item to which you want to add related messages.

– Click New in the Related Messages applet, and then select a message in the Name field. In the case of a hot spot, type the name of the file from the ZIP file in the Name field. For example: Page10.html in xyz.zip.

– If the message is in a ZIP file, then complete the Thumbnail field. To complete the Thumbnail field, type in the name of the thumbnail image to show in the PCD Viewer. Note that the image must be present in the HTML ZIP file.

– Navigate away from the record to save your changes to it.

Defining Access to, Releasing, and Revising Messaging Plans in Siebel CRM

When finished associating literature with messaging plans in Siebel CRM, you must define access to the messaging plan and then release the messaging plan. If the SADMIN user group is granted access to a messaging plan, then the released messaging plan is visible to Siebel administrators only. Until you define access to a messaging plan using the Access Group tab, the messaging plan will not be visible to any other Siebel user group. After releasing a messaging plan, you can revise it as required. Only released messaging plans are available for detailing in the PCD Viewer.

To define access to, release, and revise messaging plans

1. Log in to the Siebel business application.

2. Navigate to the Messaging Plans screen, then the Messaging Plan List view.

3. Define access to messaging plans as follows:

   a. Locate and select the messaging plan to which you want to define access.

   b. Select the Access Group tab, and then click Add.

   c. Choose a catalog on the list that appears, and then tap OK.

   The catalog that you choose must contain the users to whom you want to grant access. If you do not see a suitable catalog, then create a new catalog in Siebel CRM, add user lists to that catalog (make sure that appropriate users have been added to the user lists), and then choose that catalog in the Access Group tab. For more information about defining access control using Catalog administration, see *Siebel Order Management Guide*.

   d. Step off the record to save it.

4. Release messaging plans as follows:

    a. Locate and select the messaging plan that you want to release.

    b. In the Status field, change the status to Released.

       When you create a messaging plan, the status is set to In Progress. You can subsequently change the status to Submitted and then Approved before finally setting the status to Released. After you change the status to Released:

        – The messaging plan release date is automatically set.

        – The expiration date field becomes editable and a required field. That is, you must type a suitable expiration date into the Expiration Date field, otherwise you will not be able to save the messaging plan with a status of Released.

        – The messaging plan is available for detailing. That is, the messaging plan is available in the PCD Viewer to show to customers. Messaging plans that do not have a status of Released are not available in the PCD Viewer to show to customers.

        – The messaging plan is visible to the user groups that have been granted access as shown in Step 3.

5. (Optional) Revise a released messaging plan as follows:

    a. Locate and select the released messaging plan that you want to revise.

    b. Click Revise.

       A copy of the messaging plan you selected in Step 5a. is created where only the value in the Version field changes by increasing by one. Note that the Access Group information defined for the messaging plan you selected in Step 5a. is not copied over to the revised messaging plan.

    c. Define access to the (revised) messaging plan as shown in Step 3.

    d. Release the (revised) messaging plan as shown in Step 4.

PCD Viewer APIs

Table 9–1 describes the APIs that you can use to perform specific operations in the PCD Viewer. You access these APIs from external JavaScript files which have been packaged into ZIP files. The ZIP files in turn are added as presentation (or messaging plan) items to messaging plans. External JavaScript files can, for example, call these APIs to perform specific operations in the following manner:

```
var arg = [];
arg[0] = "API Name";
arg[1] = "Parameter1";     window.parent.postMessage(arg, "*");
```

For example:

```
var arg = [];
arg[0] = "detailerMenuBar";
arg[1] = "hide";            window.parent.postMessage(arg, "*");
```

where:

- `"detailerMenuBar"` is the API Name.

- `"hide"` is the additional parameter required to invoke that API.

Table 9–1 PCD Viewer Application Programming Interface

API Name	Description	Arguments and Values
detailerMenuBar	Used to show or hide the title (or header navigation) bar in the PCD Viewer.	Argument: arg1 Value: hide or show
detailerThreadBar	Used to show or hide the footer navigation bar in the PCD Viewer.	Argument: arg1 Value: hide or show
GotoNextItem	Used to navigate to the next item in a presentation (or messaging plan).	Argument: none
GotoPreviousItem	Used to navigate to the previous item in a presentation (or messaging plan).	Argument: none
NavigateToItem	Used to navigate to a specific item in a presentation (or messaging plan).	Argument: arg1 Value: The name of the item to which you want to navigate to.
RelatedItemStartTime	Used to start time tracking on related messages or items. A related message does not necessarily have to be a literature record - it can be another file inside the ZIP.	None
RelatedItemEndTime	Used to stop time tracking on related messages.	Argument: arg1 Value: The file name of the related message.

Showing Presentations in Siebel Mobile

You use the Detail link in the Siebel Mobile application for Siebel Pharma to present interactive, promotional content to customers. The following procedure shows you how to deliver personalized content and presentations to customers.

To show presentations in Siebel Mobile

1. Navigate to the Call Details view.

   Tap the Side Menu icon on the application banner, tap Calls, and then drill down on a call in the calendar in the right pane. For more information, see "Displaying Call Details" on page 9-4.

2. Tap Detail in the work area.

   The messaging plan preview page that opens contains the following information:

   - A list of all accessible messaging plans (presentations), which are released and unexpired, appears at the top of the page.

   - The messaging plan items (presentation items or slides) associated with the selected messaging plan appear next in thumbnail fromat.

   - Tap the green Related label below a messaging plan item to show the related messages for that item (if there are any).

3. Tap the messaging plan that you want to show, and then tap Launch to start the presentation.

   The messaging plan opens in the PCD Viewer.

   If Enable Direct Launch is set for messaging plans in Siebel CRM, then you can also tap any messaging plan item followed by Launch to start the presentation. In

this case, the messaging plan item opens in full-screen mode in the PCD Viewer. To see any preceding items in the presentation, navigate back to them as needed.

4. Navigate the presentation as follows:

    a. Use the Next and Previous arrows to scroll through the presentation.

    b. Tap anywhere at the bottom of the screen to activate a footer navigation bar showing the messaging plan items in thumbnail image format. Then do the following as required:

        – Tap any thumbnail image to open and show the selected messaging plan item in full-screen mode.

        – Use the Next and Previous arrows to scroll through the thumbnail images.

    c. Tap anywhere at the top of the screen to activate the header navigation bar. The following options are available on the header navigation bar:

        – **Done.** Tap when finished to go to the Feedback page. For more information, see "Recording Responses to Presentations in Siebel Mobile" on page 9-35.

        – **Exit.** Tap to exit the PCD Viewer.

        – **Full.** Tap to show the presentation in full screen mode.

        – **Related.** Tap to go to and preview a slide's related messaging plan items. Tap Player in the header navigation bar to return to the main slide.

Recording Responses to Presentations in Siebel Mobile

You use the Detail button in the Siebel Mobile application for Siebel Pharma to present interactive, promotional content or presentations to customers and then to capture the customer responses to that presentation content. When you have finished showing a presentation by tapping Done in the header navigation bar, the Feedback page opens showing a summary of the presented material in thumbnail format and the time (in seconds) spent on each slide. On the Feedback page, you can capture the customer responses to the presentation content using the star rating control.

To record responses to presentations during a call

1. Tap Done when you have finished showing the presentation.

    The Feedback page opens showing a summary of the content that was presented in thumbnail format, and the time (in seconds) spent on each presentation item. For more information about showing presentations, see "Showing Presentations in Siebel Mobile" on page 9-34.

2. Capture the customer rating for each presentation item as follows:

    a. Tap the appropriate number of stars below each item as required.

       The significance of each star rating is as follows:

        – One star indicates Rejected.

        – Two stars indicates Not Interested.

        – Three stars indicates Need Data.

        – Four stars indicates Continue Discussion.

        – Five stars indicates Accepted.

        – No stars indicates No Feedback.

The last option (no stars indicating no feedback) is allowed only if the Disable Response check box is selected for the messaging plan in Siebel CRM, making the capturing of customer feedback to presentations optional. For more information, see "Associating Literature with Messaging Plans in Siebel CRM" on page 9-31.

If the Disable Response check box is not selected (True) for the messaging plan in Siebel CRM, then response ratings must be logged for all presentation items before you will be allowed to submit the presentation feedback. For more information about creating messaging plans in Siebel CRM, see *Siebel Life Sciences Guide*.

If the following message appears, then you cannot proceed until you provide a rating for each presentation item: *Rating is a must*.

b. Tap Submit when you have recorded all feedback.

The response ratings are logged under the Presentation Details related item for the call. For more information, see "Viewing Presentation Detail Information for a Call" on page 9-11.

A record for the product associated with the messaging plan is also created under Products Detailed for the call. For more information, see "Modifying Product Details for a Call" on page 9-9.

After you submit the presentation feedback, all feedback-related account and contact call records are editable until the respective call is submitted.

Task Flows for Siebel Pharma

The Siebel Pharma task flows that sales representatives typically carry out are divided into the following areas:

- "Planning and Preparing for Customer Calls" on page 9-36
- "Conducting Customer Calls" on page 9-37

Planning and Preparing for Customer Calls

Sales representatives typically perform the following tasks when planning and preparing for customer calls:

- Check the appointments for today.

  For more information, see "Viewing Call Planning Information" on page 9-2.

- Review the route for the day.

  For more information, see "Displaying Location Details in Siebel Mobile" on page 8-17.

- Review the notifications list.

  For more information, see "Reviewing Notification Messages in Siebel Mobile" on page 8-11.

- Prepare for contact calls and perform precall planning tasks (such as, reviewing the associated contact relationships and the best call times for the contact) as follows:

  - Review, modify, and create new contacts as required. For more information, see the following:

- "Displaying Contact Details" on page 9-21

- "Modifying Contact Information" on page 9-21

- Review, modify, and create new contact calls as required. For more information, see "Modifying Call Information for a Contact" on page 9-22.

- Review and modify as required the contact's associated addresses, best call times, state license, affiliated accounts, contact relationships, and attachments.

    For more information, see the following:

    - "Modifying Address Information for a Contact" on page 9-23

    - "Modifying Best Time Information for a Contact" on page 9-23

    - "Modifying State License Information for a Contact" on page 9-24

    - "Modifying Account Affiliation Information for a Contact" on page 9-25

    - "Modifying Contact Relationship Information for a Contact" on page 9-26

    - "Modifying Attachment Information for a Contact" on page 9-27

- Prepare for account calls and perform precall planning tasks (such as, reviewing the associated account relationships) as follows:

    - Review, modify, and create new accounts as required. For more information, see the following:

        - "Displaying Account Details" on page 9-13

        - "Modifying Account Information" on page 9-14

    - Review, modify, and create new account calls as required. For more information, see "Modifying Call Information for an Account" on page 9-15.

    - Review and modify as required the account's associated contacts, addresses, affiliated contacts, account relationships, and attachments. For more information, see the following:

        - "Modifying Contact Information for an Account" on page 9-14

        - "Modifying Address Information for an Account" on page 9-16

        - "Modifying Contact Affiliation Information for an Account" on page 9-16

        - "Modifying Account Relationship Information for an Account" on page 9-17

        - "Modifying Attachment Information for an Account" on page 9-18

Conducting Customer Calls

Sales representatives typically perform the following tasks when conducting customer calls:

- Review, modify, and create new calls as required.

    For more information, see the following:

    - "Modifying Attendee Information for a Call" on page 9-5

    - "Displaying Call Details" on page 9-4

    - "Modifying Call Information" on page 9-5

- Review and modify as required the call's associated attendees, promotional items, samples, product details, literature, and presentation detail information.

For more information, see the following:

- – "Modifying Attendee Information for a Call" on page 9-5
- – "Modifying Promotional Items for a Call" on page 9-7
- – "Modifying Samples for a Call" on page 9-8
- – "Modifying Product Details for a Call" on page 9-9
- – "Adding Literature Information to a Call" on page 9-10
- – "Viewing Presentation Detail Information for a Call" on page 9-11

- Deliver personalized content and presentations to customers and capture feedback as required.

  For more information, see "Using the PCD Viewer in Siebel Mobile" on page 9-28.

- Record signatures for calls.

  For more information, see "Capturing the Electronic Signature for a Call" on page 9-11.

- Submit calls for processing.

  For more information, see "Submitting a Call for Processing" on page 9-12.

- Review the validation results for a call as required to determine any errors in the call data.

  For more information, see "Managing Accounts for Siebel Pharma" on page 9-13.

Unsupported Features in Offline Mode

The features listed in this topic are not supported in offline mode in the Siebel Mobile disconnected application for Siebel Pharma. You must be connected to the Internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application for Siebel Pharma:

- Use the search filter for the affiliated contacts (when adding Attendees)

  For more information, see "Modifying Attendee Information for a Call" on page 9-5.

- Directly create new address records for accounts

  In the case of child views where records are being associated, associating a downloaded address with a selected account is supported in offline mode. For more information, see "Modifying Address Information for an Account" on page 9-16.

- Directly create new address records for contacts

  In the case of child views where records are being associated, associating a downloaded address with a selected contact is supported in offline mode. For more information, see "Modifying Address Information for a Contact" on page 9-23.

For more information about the general features that are not supported in offline mode, see "Unsupported Siebel Mobile Features in Offline Mode" on page 8-42.

10

Using the Siebel Mobile Disconnected Application for Siebel Service

This chapter describes the tasks that a user of the Siebel Mobile application for Siebel Service can execute in online (connected) and offline (disconnected) mode. Tasks and features that are not supported in offline mode are listed. It includes the following topics:

- Managing Activities for Siebel Service

- Managing Service Requests for Siebel Service

- Managing Accounts for Siebel Service

- Managing Parts for Siebel Service

- Managing Orders for Siebel Service

- Managing Invoices for Siebel Service

- Managing Assets for Siebel Service

- Managing Shifts for Siebel Service

- Tasks Flows for Siebel Service

- Unsupported Features in Offline Mode

> **Note:** The procedures in this chapter assume that inline editing is configured for Siebel Mobile. If inline editing is not configured, then pencil icons appear in the user interface. You can tap these icons to edit information. For more information, see "Inline Editing" on page 8-7.

Managing Activities for Siebel Service

An *activity* is a task that you perform for a contact, account, or service request.

The following procedures related to activities and activity management are included in this topic:

- "Displaying Activity Details" on page 10-2

- "Modifying Activity Information" on page 10-3

- "Modifying Contact Information for an Activity" on page 10-4

- "Verifying and Ordering Parts and Tools for an Activity" on page 10-4

- "Viewing Instruction Information for an Activity" on page 10-5

- "Viewing Step Information for an Activity" on page 10-5

- "Modifying Part Tracker Information for an Activity" on page 10-6

- "Modifying Time Tracker Information for an Activity" on page 10-11

- "Modifying Expense Tracker Information for an Activity" on page 10-12

- "Creating Invoices from Activities Using the Auto Invoice Link" on page 10-12

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Activity Details

You can display activity details by using the Activities list.

To display activity details

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

    - The Activities list and details for the selected activity in the right pane or work area.

    - A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the activities list.

    All details for the selected activity appear below the list in the work area.

3. To view the related items for the selected activity, tap the following names in the list in the left pane:

    - **Contacts.** Shows the contact information for the activity. For more information, see "Modifying Contact Information for an Activity" on page 10-4.

    - **Recommended Parts and Tools.** Shows the items required to complete the activity. For more information, see "Verifying and Ordering Parts and Tools for an Activity" on page 10-4.

    - **Instructions.** Shows the instructions required to complete the activity. For more information, see "Viewing Instruction Information for an Activity" on page 10-5.

    - **Steps.** Shows the steps required to complete the activity. For more information, see the following:

        – "Viewing Step Information for an Activity" on page 10-5

        – "Recording Step Completion for an Activity" on page 10-6

    - **Part Tracker.** Shows the activity parts being tracked. For more information, see the following:

        – "Modifying Part Tracker Information for an Activity" on page 10-6

        – "Removing a Serialized Part" on page 10-7

        – "Installing a Replacement Serialized Part" on page 10-8

        – "Modifying Activity Parts by Scanning Barcode Data" on page 10-9

- **Time Tracker.** Shows how activity time is being tracked. For more information, see "Modifying Time Tracker Information for an Activity" on page 10-11.

- **Expense Tracker.** Shows the activity expenses being tracked. For more information, see "Modifying Expense Tracker Information for an Activity" on page 10-12.

- **Invoices.** Shows the activity invoices. For more information, see the following:

  - "Creating Invoices from Activities Using the Auto Invoice Link" on page 10-12

  - "Capturing the Electronic Signature for an Invoice" on page 10-13

  - "Viewing Invoice Information for an Activity" on page 10-14

  - "Printing Invoices Associated with an Activity" on page 10-14

Modifying Activity Information

Complete the following procedure to modify activity information.

To modify activity information

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the right pane or work area.

   - A list in the left pane in which you can select the related items for activities.

2. Update an existing activity as follows:

   a. Tap an activity in the Activities list.

      All details for the selected activity appear below the list in the work area.

   b. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new activity as follows:

   a. Tap the plus (+) icon in the work area.

   b. Enter the information for the new activity in the fields that appear, and then tap the save icon when finished.

      The following table describes the fields.

Field Name	Description
SR #	Select a service request number to associate with the activity.
Account	Select an account to associate with the activity.
Activity #	Displays the read-only activity number.
Type	Select an activity type.
Description	Type a description of the activity.
Status	Select a status for the activity.
Symptom	Select a symptom to associate with the activity.

Field Name	Description
Priority	Select a priority for the activity.
Due	Select the due date and time for the activity.
Billable	Select this check box if the activity is billable. Otherwise deselect this check box.
Rate List	Select a rate list to associate with the activity.
Price List	Select a price list to associate with the activity.
Resolution	Select a resolution for the activity.
Comments	Type any necessary comment about the activity.

Modifying Contact Information for an Activity

Complete the following procedure to modify the contact information for an activity.

To modify the contact information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ■ The Activities list and details for the selected activity in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Update an existing activity contact as follows:

   a. Tap Contacts in the list in the left pane.

   All the contacts associated with the activity appear in the work area, and all details for the selected activity above the Contacts list in the work area.

   b. Tap the contact that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Add an existing contact to the activity as follows:

   a. Tap Contacts in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Choose the contact on the list that appears, and then tap the OK.

Verifying and Ordering Parts and Tools for an Activity

Complete the following procedure to verify and order parts and tools for an activity. Before visiting a customer to complete an activity, you must verify that the required parts and tools are in your vehicle trunk and order any needed parts and tools.

To verify and order parts and tools for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ■ The Activities list and details for the selected activity in the right pane or work area.

- A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Tap Recommended Parts & Tools in the list in the left pane.

   All the parts and tools associated with the activity appear in the work area, and all details for the selected activity appear above the Parts & Tools list in the work area.

4. To verify that the required parts and tools are in your vehicle trunk, tap Check Trunk in the work area.

   The number of available parts and tools in your vehicle trunk appears.

5. Order a part or tool for the activity as follows:

   a. Choose the part or tool that you want to order in the work area.

   b. Tap Order Part in the work area.

      If an order does not already exist for the part or tool, then an order for the part or tools is created.

   c. To display the order line items, tap Order number (#).

   d. To display the line item details, tap an order line item.

Viewing Instruction Information for an Activity

Complete the following procedure to view the instruction information for an activity.

To view the instruction information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the right pane or work area.

   - A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Tap Instructions in the list in the left pane.

   All the instructions associated with the activity appear in the work area, and all details for the selected activity appear above the Instructions list in the work area.

4. Tap the instruction that you want to view.

Viewing Step Information for an Activity

Complete the following procedure to view the step information for an activity.

To view the step information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the right pane or work area.

   - A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.

3. Tap Steps in the list in the left pane.

All the steps associated with the activity appear in the work area, and all details for the selected activity appear above the Steps list in the work area.

4. Tap the step that you want to view.

Recording Step Completion for an Activity

Complete the following procedure to record step completion for an activity. You record step completion to keep track of your work progress on the activity. As you complete each activity step, you mark the step as done.

To record step completion for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

- The Activities list and details for the selected activity in the right pane or work area.

- A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.

3. Record step completion as follows:

a. Tap Steps in the list in the left pane.

All the steps associated with the activity appear in the work area, and all details for the selected activity appear above the Steps list in the work area.

b. Tap the step that you want to complete.

c. Select the Done check box to indicate completion of the step.

d. Enter any comments in the Comments field as required.

4. Repeat 3 for any other steps that are complete.

Modifying Part Tracker Information for an Activity

Complete the following procedure to modify the part tracker information for an activity. You use part tracker to track part movements between locations.

To modify the part tracker information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

- The Activities list and details for the selected activity in the right pane or work area.

- A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

All details for the selected activity appear below the list in the work area.

3. Update an existing activity part movement as follows:

a. Tap Part Tracker in the list in the left pane.

All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.

b. Tap the part that you want to update.

c. Tap the record field that you want to update, and update the field value.

You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new activity part movement as follows:

a. Tap Part Tracker in the list in the left pane, and then tap Move in the work area.

b. Enter the information for the new part movement in the fields that appear, and then tap the save icon when finished.

The following table describes the fields.

Field Name	Description
Product	Select the product that is associated with the part.
Part Number	The part number associated with the product.
Status	Select a status for the part.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
Comments	Type any necessary comment about the activity part movement.
From	Select the location from which you want to move the part.
To	Select the location to which you want to move the part.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

5. Tap Commit to generate the inventory transactions.

> **Note:** If you complete part tracker updates in offline mode, then the inventory transactions are generated when the mobile device is next synchronized with the Siebel Server.

Removing a Serialized Part

Complete the following procedure to remove a defective serialized part from service. After you complete this procedure, you install a replacement serialized part. For more information, see "Installing a Replacement Serialized Part" on page 10-8.

To remove a serialized part

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

- The Activities list and details for the selected activity in the right pane or work area.

- A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Remove the serialized part as follows:

   a. Tap Part Tracker in the list in the left pane.

      All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.

   b. Tap Move in the work area.

   c. Enter the information for the part movement in the fields that appear, and then tap the save icon when finished.

      The following table describes the fields.

Field Name	Description
Product	Select the product that is associated with the part.
Status	Select a value of Defective.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
From	Select a value of Customer.
To	Select a value of Trunk.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

4. Tap Commit.

   Note: If you complete part tracker updates in offline mode, then the inventory transactions are created when the mobile device is synchronized with the Siebel Server.

5. Tap RMA to create a return merchandise authorization for the part movement.

Installing a Replacement Serialized Part

Complete the following procedure to install a replacement serialized part. Before you complete this procedure, you remove the defective serialized part from service. For more information, see "Removing a Serialized Part" on page 10-7.

To install a replacement serialized part

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the right pane or work area.

   - A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Install the replacement serialized part as follows:

   a. Tap Part Tracker in the list in the left pane.

      All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.

   b. Tap Move in the work area.

   c. Enter the information for the part movement in the fields that appear, and then tap the save icon when finished.

      The following table describes the fields.

Field Name	Description
Product	Select the product that is associated with the part.
Status	Select a value of Good.
Quantity	Type the quantity of the part.
Asset #	Select an asset number to associate with the part.
From	Select a value of Service Order or Trunk.
To	Select a value of Customer.
Billable	Select this check box to indicate if the part movement is billable. Otherwise deselect this check box.

4. Tap Commit.

   Note: If you complete part tracker updates in offline mode, then the inventory transactions are created when the mobile device is synchronized with the Siebel Server.

Modifying Activity Parts by Scanning Barcode Data

You can use a barcode reader to update existing or add new parts for an activity by scanning the part's barcode data. For more information about barcodes in general and about how to set up the barcode interface for specific views and applets in Siebel CRM, see the chapter about barcodes in *Siebel Field Service Guide*.

To modify activity parts by scanning barcode data

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ▪ The Activities list and details for the selected activity in the right pane or work area.

   ▪ A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Update an existing activity part by scanning the barcode data as follows:

   a. Tap Part Tracker in the list in the left pane.

All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the Part Tracker list in the work area.

The following barcode reader information appears above the activity details in the work area: a Barcode New icon, a Barcode Update icon, and a field with a drop-down list.

b. Tap the Barcode Update icon.

c. In the drop-down list next to the Barcode Update icon, select the type of data associated with the barcode (for example, select Asset Number Entry).

d. Tap the part record to receive the barcode data.

e. Scan the barcode.

The appropriate field (Asset #) in the selected part record is populated with the barcode data. If the field already has a value, then the barcode data replaces the value.

Accessibility users must enter data using the following keyboard shortcuts: Ctrl+*(Asset#)* Ctrl+\\. For example: Control\\MASSET2Control\\.

Note: By scanning barcode data, you can update assets belonging to the same product only.

---

4. Add a new activity part by scanning the part's barcode data as follows:

a. Tap Part Tracker in the list in the left pane.

All the tracked parts associated with the activity appear in the work area, and all details for the selected activity appear above the list in the work area.

The following barcode reader information appears above the activity details in the work area: a Barcode New icon, a Barcode Update icon, and a field with a drop-down list.

b. Tap the Barcode New icon.

c. In the drop-down list next to the Barcode New icon, select the type of data associated with the barcode (for example, select Asset Number Entry).

d. Scan the barcode for the part.

A new part tracker record is created, and the appropriate field (Asset #) in the new record is populated with the barcode data.

Accessibility users must enter data using the following keyboard shortcuts: Ctrl+\\ *(Asset#)* Ctrl+\\. For example: Control\\MASSET1Control\\.

Note: By scanning barcode data, you can update assets belonging to the same product only.

---

5. Enter other appropriate field values in the new record.

Related Topics:

"Running Predefined Queries in Siebel Mobile" on page 8-18

"Modifying Records in Siebel Mobile" on page 8-9

Modifying Time Tracker Information for an Activity

Complete the following procedure to modify the time tracker information for an activity. Time tracker includes information about the time (for example, travel or labor time) that is associated with the activity. You can include this time in a customer invoice.

To modify the time tracker information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ■ The Activities list and details for the selected activity in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Update an existing activity time as follows:

   a. Tap Time Tracker in the list in the left pane.

   All the tracked times associated with the activity appear in the work area, and all details for the selected activity appear above the Time Tracker list in the work area.

   b. Tap the time that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new activity time as follows:

   a. Tap Time Tracker in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new time in the fields that appear, and then tap the save icon when finished.

   The following table describes the fields.

Field Name	Description
Type	Select the type of time.
Rate	Select the rate for the time.
Date	Select the date of the time.
Start Time	Type the start time for the activity. This field is filled in with the current time, but you can change this time.
End Time	Type the end time for the activity. You can leave this field blank, close the form, and then tap End in the work area to record the current time in the End Time field. The End link is not supported in offline mode.
Billable	Select this check box to indicate if the time is billable. Otherwise deselect this check box.

Modifying Expense Tracker Information for an Activity

Complete the following procedure to modify the expense tracker information for an activity. Expense tracker includes information about the expenses that are incurred for the activity. You can include these expenses in a customer invoice.

To modify the expense tracker information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ■ The Activities list and details for the selected activity in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Update an existing activity expense as follows:

   a. Tap Expense Tracker in the list in the left pane.

   All the tracked expenses associated with the activity appear in the work area, and all details for the selected activity appear above the Expense Tracker list in the work area.

   b. Tap the expense that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new activity expense as follows:

   a. Tap Expense Tracker in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new expense in the fields that appear, and then tap the save icon when finished.

   The following table describes the fields.

Field Name	Description
Date	Displays the date of the expense.
Type	Select the type of expense.
Amount	Type the amount to expense.
Rate	Select a rate for the expense.
Billable	Select this check box to indicate if the expense is billable. Otherwise deselect this check box.
Comments	Type any necessary comment about the expense.

Creating Invoices from Activities Using the Auto Invoice Link

When you create an invoice from an activity using the Auto Invoice link, an invoice record is automatically created for the activity using the data from the activity.

> **Note:** This task is not supported in offline mode.

To create an invoice from an activity using the Auto Invoice link

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ■ The Activities list and details for the selected activity in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area. Note that to create an invoice from this activity, then the Billable check box must be selected on the activity.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.

4. Tap Auto Invoice to create an invoice from the activity.

5. Tap the Invoice # link to open the invoice and review the invoice line items.

Capturing the Electronic Signature for an Invoice

After you create an invoice, you capture the signature of the contact for the invoice. You capture this signature to verify that the contact reviewed the invoice.

> **Note:** Signature display is not supported in offline mode.

To capture the electronic signature for an invoice

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   ■ The Activities list and details for the selected activity in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.

4. Tap the invoice for which you want to capture the electronic signature.

5. Tap Sign.

   Information about the invoice and about the contact for the invoice appears.

6. Capture the signature of the contact in the signature input box.

7. If you make a mistake when capturing the signature, tap Clear to clear the signature and start again.

8. Save the record when finished.

Viewing Invoice Information for an Activity

Complete the following procedure to view the invoice information for an activity.

To view the invoice information for an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the right pane or work area.

   - A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.

4. Tap the invoice that you want to view.

   All details for the selected invoice appear below the list in the work area.

5. Tap the Invoice # link to open the invoice and review the invoice line item details.

Printing Invoices Associated with an Activity

Complete the following procedure to print an invoice associated with an activity.

> **Note:** The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded javascript (http://embeddedjs.com/) and uses MIT licensing. For more information, see "MIT License" on page 2-5.

To print an invoice associated with an activity

1. Tap the Side Menu icon on the application banner, and then tap Activities to display the following:

   - The Activities list and details for the selected activity in the right pane or work area.

   - A list in the left pane in which you can select the related items for activities.

2. Tap an activity in the Activities list.

   All details for the selected activity appear below the list in the work area.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the activity appear in the work area, and all details for the selected activity appear above the Invoices list in the work area.

4. Tap the invoice that you want to print.

   All details for the selected invoice appear below the list in the work area.

5. Tap the Invoice # link to open the invoice.

   All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the list in the work area.

6. Tap Print Preview to preview the invoice details.

7. Tap Print to print the invoice.

Managing Service Requests for Siebel Service

A *service request* is a customer request for service. It includes the activities associated with the request and information about the response to the request.

The following procedures related to service requests and service request management are included in this topic:

- "Displaying Service Request Details" on page 10-15
- "Modifying Service Request Information" on page 10-16
- "Modifying Order Information for a Service Request" on page 10-16
- "Modifying Activity Information for a Service Request" on page 10-17
- "Creating Invoices from Service Requests Using the Auto Invoice Link" on page 10-18

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Service Request Details

You can display service request details by using the Service Reqs list.

To display service request details

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

   - The Service Requests list and details for the selected service request in the right pane or work area.
   - A list in the left pane in which you can select the related items for service requests.

2. Tap a service request in the Service Requests list.

   All details for the selected service request appear below the list in the work area.

3. To view the related items for the selected service request, tap the following names in the list in the left pane:

   - **Orders.** Shows the order information for the service request. For more information, see "Modifying Order Information for a Service Request" on page 10-16.
   - **Activities.** Shows the activity information for the service request. For more information, see "Modifying Activity Information for a Service Request" on page 10-17.
   - **Invoices.** Shows the invoice information for the service request. For more information, see "Creating Invoices from Service Requests Using the Auto Invoice Link" on page 10-18 and the following:
     - "Viewing Invoice Information for a Service Request" on page 10-18
     - "Printing Invoices Associated with a Service Request" on page 10-19

Modifying Service Request Information

Complete the following procedure to modify service request information.

To modify service request information

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

   ■ The Service Requests list and details for the selected service request in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for service requests.

2. Update an existing service request as follows:

   a. Tap a service request in the Service Requests list.

   All details for the selected service request appear below the list in the work area.

   b. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

3. Create a new service request as follows:

   a. Tap the plus (+) icon in the work area.

   b. Enter the information for the new service request in the fields that appear, and then tap the save icon when finished.

Modifying Order Information for a Service Request

Complete the following procedure to modify the order information for a service request.

To modify the order information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

   ■ The Service Requests list and details for the selected service request in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for service requests.

2. Tap a service request in the Service Requests list.

   All details for the selected service request appear below the list in the work area.

3. Update an existing service request order as follows:

   a. Tap Orders in the list in the left pane.

   All the orders associated with the service request appear in the work area, and all details for the selected service request appear above the Orders list in the work area.

   b. Tap the order that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new service request order as follows:

   a. Tap Orders in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new order in the fields that appear, and then tap the save icon when finished.

Modifying Activity Information for a Service Request

Complete the following procedure to modify the activity information for a service request. You can add a specific activity to a service request that is associated with an account. You can also add a miscellaneous activity, such as depositing funds at a bank or obtaining service work on a truck, to a service request that is not associated with an account.

To modify the activity information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

- The Service Requests list and details for the selected service request in the right pane or work area.

- A list in the left pane in which you can select the related items for service requests.

2. Tap a service request in the Service Requests list.

All details for the selected service request appear below the list in the work area.

3. Update an existing service request activity as follows:

   a. Tap Activities in the list in the left pane.

    All the activities associated with the service request appear in the work area, and all details for the selected service request appear above the Activities list in the work area.

   b. Tap the activity that you want to update.

   c. Tap the record field that you want to update, and update the field value.

    You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new service request activity as follows:

   a. Tap Activities in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new activity in the fields that appear, and then tap the save icon when finished.

Creating Invoices from Service Requests Using the Auto Invoice Link

When you create an invoice from a service request using the Auto Invoice link, an invoice record is automatically created for the service request using the data from the service request.

To create an invoice from a service request using the Auto Invoice link

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

   - The Service Requests list and details for the selected service request in the right pane or work area.

   - A list in the left pane in which you can select the related items for service requests.

2. Tap a service request in the Service Requests list.

   All details for the selected service request appear below the list in the work area. Note that to create an invoice from this service request, the Billable check box must be selected on the service request.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the service request appear in the work area, and all details for the selected service request appear above the Invoices list in the work area.

4. Tap Auto Invoice to create an invoice from the service request.

5. Tap the Invoice # link to open the invoice and review the invoice line items.

Viewing Invoice Information for a Service Request

Complete the following procedure to view the invoice information for a service request.

To view the invoice information for a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

   - The Service Requests list and details for the selected service request in the right pane or work area.

   - A list in the left pane in which you can select the related items for service requests.

2. Tap a service request in the Service Requests list.

   All details for the selected service request appear below the list in the work area.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the service request appear in the work area, and all details for the selected service request appear above the Invoices list in the work area.

4. Tap the invoice that you want to view.

5. Tap the Invoice # link to open the invoice and review the invoice line item details.

Printing Invoices Associated with a Service Request

Complete the following procedure to print an invoice associated with a service request.

> **Note:** The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded javascript (`http://embeddedjs.com/`) and uses MIT licensing. For more information, see "MIT License" on page 2-5.

To print an invoice associated with a service request

1. Tap the Side Menu icon on the application banner, and then tap Service Reqs to display the following:

   - The Service Requests list and details for the selected service request in the right pane or work area.

   - A list in the left pane in which you can select the related items for service requests.

2. Tap a service request in the Service Requests list.

   All details for the selected service request appear below the list in the work area.

3. Tap Invoices in the list in the left pane.

   All the invoices associated with the service request appear in the work area, and all details for the selected service request appear above the Invoices list in the work area.

4. Tap the invoice that you want to print.

5. Tap the Invoice # link to open the invoice.

   All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the Invoice Line Items list in the work area.

6. Tap Print Preview to preview the invoice details.

7. Tap Print to print the invoice.

Managing Accounts for Siebel Service

An *account* is a company or individual with whom your company conducts business. It represents the relationship between your company and that company or individual. You can use the Account Details screen as the primary navigation tool for your customer interactions.

The following procedures related to accounts and account management are included in this topic:

- "Displaying Account Details" on page 10-20

- "Viewing Contact Information for an Account" on page 10-20

- "Modifying Service Request Information for an Account" on page 10-21

- "Viewing Asset Information for an Account" on page 10-21

- "Viewing Entitlement Information for an Account" on page 10-22

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Account Details

You can display account details by using the Accounts list.

To display account details

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the right pane or work area.

   - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. To view the related items for the selected account, tap the following names in the list in the left pane:

   - **Contacts.** Shows the contact information for the account. For more information, see "Viewing Contact Information for an Account" on page 10-20.

   - **Service Requests.** Shows the service request information for the account. For more information, see "Modifying Service Request Information for an Account" on page 10-21.

   - **Assets.** Shows the asset information for the account. For more information, see "Viewing Asset Information for an Account" on page 10-21.

   - **Entitlements.** Shows the entitlement information for the account. For more information, see "Viewing Entitlement Information for an Account" on page 10-22.

Viewing Contact Information for an Account

Complete the following procedure to view the contact information for an account.

To view the contact information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the right pane or work area.

   - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Tap Contacts in the list in the left pane.

   All the contacts associated with the account appear in the work area, and all details for the selected account appear above the Contacts list in the work area.

4. Tap the contact that you want to view.

Modifying Service Request Information for an Account

Complete the following procedure to modify the service request information for an account.

To modify the service request information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   ■ The Accounts list and details for the selected account in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Update an existing account service request as follows:

   a. Tap Service Requests in the list in the left pane.

   All the service requests associated with the account appear in the work area, and all details for the selected account appear above the Service Requests list in the work area.

   b. Tap the service request that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new account service request as follows:

   a. Tap Service Requests in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new service request in the fields that appear, and then tap the save icon when finished.

Viewing Asset Information for an Account

Complete the following procedure to view the asset information for an account.

To view the asset information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   ■ The Accounts list and details for the selected account in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Tap Assets in the list in the left pane.

   All the assets associated with the account appear in the work area, and all details for the selected account appear above the Assets list in the work area.

4. Tap the asset that you want to view.

Viewing Entitlement Information for an Account

Complete the following procedure to view the entitlement information for an account.

To view the entitlement information for an account

1. Tap the Side Menu icon on the application banner, and then tap Accounts to display the following:

   - The Accounts list and details for the selected account in the right pane or work area.

   - A list in the left pane in which you can select the related items for accounts.

2. Tap an account in the Accounts list.

   All details for the selected account appear below the list in the work area.

3. Tap Entitlements in the list in the left pane.

   All the entitlements associated with the account appear in the work area, and all details for the selected account appear above the Entitlements list in the work area.

4. Tap the entitlement that you want to view.

Managing Parts for Siebel Service

A *part* is an item that you sell to the customer.

The following procedures related to parts and part management are included in this topic:

- "Displaying Part Details" on page 10-22

- "Viewing Availability Information for a Part" on page 10-23

- "Viewing Substitute Information for a Part" on page 10-23

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Part Details

You can display part details by using the Product Inventory list.

To display part details

1. Tap the Side Menu icon on the application banner, and then tap Browser to display the following:

   - The Product Inventory list and details for the selected part in the right pane or work area.

   - A list in the left pane in which you can select the related items for product inventory.

2. Tap a part in the Product Inventory list.

3. To view the related items for the selected part, tap the following names in the list in the left pane:

   - **Availability.** Shows the availability information for the part. For more information, see "Viewing Availability Information for a Part" on page 10-23.

- **Substitutes.** Shows the substitute information for the part. For more information, see "Viewing Substitute Information for a Part" on page 10-23.

Viewing Availability Information for a Part

Complete the following procedure to view the availability information for a part.

To view the availability information for a part

1. Tap the Side Menu icon on the application banner, and then tap Browser to display the following:
   - The Product Inventory list and details for the selected part in the right pane or work area.
   - A list in the left pane in which you can select the related items for product inventory.
2. Tap a part in the Product Inventory list.
3. Tap Availability in the left pane to view the availability for the selected part.

   All the inventory level availability details associated with the part appear in the work area, and all details for the selected part appear above the Inventory Level list in the work area.

Viewing Substitute Information for a Part

Complete the following procedure to view the substitute information for a part.

To view the substitute information for a par

1. Tap the Side Menu icon on the application banner, and then tap Browser to display the following:
   - The Product Inventory list and details for the selected part in the right pane or work area.
   - A list in the left pane in which you can select the related items for product inventory.
2. Tap a part in the Product Inventory list.
3. Tap Substitutes in the left pane to view the substitute availability for the selected part.

   All the substitute availability details appear in the work area, and all details for the selected part appear above the Substitutes list in the work area.

Managing Orders for Siebel Service

An *order* is a commitment on the part of the customer to purchase products and services at a specific price. It can be generated from a quote or created directly by a sales person, call center agent, and field technician.

The following procedures related to orders and order management are included in this topic:

- "Displaying Order Details" on page 10-24
- "Modifying Order Information" on page 10-24
- "Modifying Line Item Information for an Order" on page 10-25

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Order Details

You can display order details by using the Orders list.

To display order details

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:

   - The Orders list and details for the selected order in the right pane or work area.

   - A list in the left pane in which you can select the related items for orders.

2. Tap an order in the Orders list.

   All details for the selected order appear below the list in the work area.

3. To view the related items for the selected order, tap the following name in the list in the left pane:

   - **Line Items.** Shows the line item information for the order. For more information, see "Modifying Line Item Information for an Order" on page 10-25.

Modifying Order Information

Complete the following procedure to modify order information.

To modify order information

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:

   - The Orders list and details for the selected order in the right pane or work area.

   - A list in the left pane in which you can select the related items for orders.

2. Update an existing order as follows:

   a. Tap an order in the Orders list.

      All details for the selected order appear below the list in the work area.

   b. Tap the record field that you want to update, and update the field value.

      You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

   You cannot create a new order from the Orders view. You can create a new order by navigating to one of the following views:

   - Activities, then Recommended Parts and Tools. For more information, see "Verifying and Ordering Parts and Tools for an Activity" on page 10-4.

   - Activities, then Part Tracker (and using the RMA link). For more information, see "Removing a Serialized Part" on page 10-7.

Modifying Line Item Information for an Order

Complete the following procedure to modify the line item information for an order.

To modify the line item information for an order

1. Tap the Side Menu icon on the application banner, and then tap Orders to display the following:

   ■ The Orders list and details for the selected order in the right pane or work area.

   ■ A list in the left pane in which you can select the related items for orders.

2. Tap an order in the Orders list.

   All details for the selected order appear below the list in the work area.

3. Update an existing order line item as follows:

   a. Tap Line Items in the list in the left pane.

   All the line items associated with the order appear in the work area, and all details for the selected order appear above the Line Items list in the work area.

   b. Tap the line item that you want to update.

   c. Tap the record field that you want to update, and update the field value.

   You might not be allowed to update all fields in the record. You must navigate away from the record to save your changes to it.

4. Create a new order line item as follows:

   a. Tap Line Items in the list in the left pane, and then tap the plus (+) icon in the work area.

   b. Enter the information for the new line item in the fields that appear, and then tap the save icon when finished.

Managing Invoices for Siebel Service

An *invoice* is a bill to the customer for parts, labor, and other expenses that you incur.

The following procedures related to invoices and invoice management are included in this topic:

■ "Displaying Invoice Details" on page 10-26

■ "Viewing Line Item Information for an Invoice" on page 10-26

■ "Printing Invoices" on page 10-26

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Invoice Details

You can display invoice details by using the Invoices list.

To display invoice details

1. Tap the Side Menu icon on the application banner, and then tap Invoices to display the following:

    ■   The Invoices list and details for the selected invoice in the right pane or work area.

    ■   A list in the left pane in which you can select the related items for invoices.

2. Tap an invoice in the Invoices list.

    All details for the selected invoice appear below the list in the work area.

3. To view the related items for the selected invoice, tap the following name in the list in the left pane:

    ■   **Invoice Line Items.** Shows the line item information for the invoice. For more information, see the following topics:

        –   "Viewing Line Item Information for an Invoice" on page 10-26

        –   "Printing Invoices" on page 10-26

Viewing Line Item Information for an Invoice

Complete the following procedure to view the line item information for an invoice.

To view the line item information for an invoice

1. Tap the Side Menu icon on the application banner, and then tap Invoices to display the following:

    ■   The Invoices list and details for the selected invoice in the right pane or work area.

    ■   A list in the left pane in which you can select the related items for invoices.

2. Tap an invoice in the Invoices list.

    All details for the selected invoice appear below the list in the work area.

3. Tap Invoice Line Items in the list in the left pane.

    All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the Invoice Line Items list in the work area.

4. Tap an invoice line item to view the details for that line item.

Printing Invoices

Complete the following procedure to print an invoice.

Note: The print invoice capability in the Siebel Mobile application for Siebel Service is built using third-party open source embedded javascript (`http://embeddedjs.com/`) and uses MIT licensing. For more information, see "MIT License" on page 2-5.

To print an invoice

1. Tap the Side Menu icon on the application banner, and then tap Invoices to display the following:

   - The Invoices list and details for the selected invoice in the right pane or work area.

   - A list in the left pane in which you can select the related items for invoices.

2. Tap an invoice in the Invoices list.

   All details for the selected invoice appear below the list in the work area.

3. Tap Invoice Line Items in the list in the left pane.

   All the invoice line items associated with the invoice appear in the work area, and all details for the selected invoice appear above the Invoice Line Items list in the work area.

4. Tap Print Preview to preview the invoice details.

5. Tap Print to print the invoice.

Managing Assets for Siebel Service

An *asset* is property or an item of value that your company owns.

The following procedures related to assets and asset management are included in this topic:

- "Displaying Asset Details" on page 10-27

- "Viewing Measurement Information for an Asset" on page 10-28

- "Viewing Warranty Information for an Asset" on page 10-29

- "Viewing Entitlement Information for an Asset" on page 10-29 10

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Asset Details

You can display asset details by using the Assets list.

To display asset details

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:

   - The Assets list and details for the selected asset in the right pane or work area.

   - A list in the left pane in which you can select the related items for assets.

2. Tap an asset in the Assets list.

   All details for the selected asset appear below the list in the work area.

3. To view the related items for the selected asset, tap the following names in the list in the left pane:

   - **Measurements.** Shows the measurement information for the asset. For more information, see the following:

- **Warranty.** Shows the warranty information for the asset. For more information, see "Viewing Warranty Information for an Asset" on page 10-29.

- **Entitlements.** Shows the entitlement information for the asset. For more information, see "Viewing Entitlement Information for an Asset" on page 10-29.

Viewing Measurement Information for an Asset

Complete the following procedure to view the measurement information for an asset. You might view measurement information to record readings for utility meters or to measure hydraulic pressure.

To view the measurement information for an asset

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:

   - The Assets list and details for the selected asset in the right pane or work area.

   - A list in the left pane in which you can select the related items for assets.

2. Tap an asset in the Assets list.

   All details for the selected asset appear below the list in the work area.

3. Tap Measurements in the list in the left pane.

   All the measurements associated with the asset appear in the work area, and all details for the selected asset appear above the Asset Measurements list in the work area.

4. Tap the asset measurement that you want to view.

Capturing a Reading for an Asset

For tasks such as taking a utility meter reading or measuring hydraulic pressure, you must record an asset reading.

To capture a reading for an asset

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:

   - The Assets list and details for the selected asset in the right pane or work area.

   - A list in the left pane in which you can select the related items for assets.

2. Tap an asset in the Assets list.

   All details for the selected asset appear below the list in the work area.

3. Capture a new asset reading as follows:

   a. Tap Measurements in the list in the left pane.

      All the measurements associated with the asset appear in the work area, and all details for the selected asset appear above the Asset Measurements list in the work area.

   b. Tap a measurement, and then tap the plus (+) icon in the work area to capture a new reading.

    c. Enter the information for the new reading in the fields that appear, and then tap the save icon when finished.

Viewing Warranty Information for an Asset

Complete the following procedure to view the warranty information for an asset.

To view the warranty information for an asset

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:

   - The Assets list and details for the selected asset in the right pane or work area.

   - A list in the left pane in which you can select the related items for assets.

2. Tap an asset in the Assets list.

   All details for the selected asset appear below the list in the work area.

3. Tap Warranty in the list in the left pane.

   All the warranties associated with the asset appear in the work area, and all details for the selected asset appear above the Warranties list in the work area.

4. Tap the warranty that you want to view.

Viewing Entitlement Information for an Asset

Complete the following procedure to view the entitlement information for an asset.

To view the entitlement information for an asset

1. Tap the Side Menu icon on the application banner, and then tap Assets to display the following:

   - The Assets list and details for the selected asset in the right pane or work area.

   - A list in the left pane in which you can select the related items for assets.

2. Tap an asset in the Assets list.

   All details for the selected asset appear below the list in the work area.

3. Tap Entitlements in the list in the left pane.

   All the entitlements associated with the asset appear in the work area, and all details for the selected asset appear above the Entitlements list in the work area.

4. Tap the entitlement that you want to view.

Managing Shifts for Siebel Service

A *shift* is an established time interval in which employees perform work.

The following procedures related to shifts and shift management are included in this topic:

> **Note:** You must complete the relevant setup tasks detailed in *Siebel Applications Administration Guide* before using the Siebel Mobile application for Siebel Service.

Displaying Shift Details

You can display shift details by using the Shifts list. You can update shift information, including breaks and periods of unavailability (POUs), only if you use Siebel Real-time Scheduler Version 2.1 or later as your scheduling engine and Siebel Field Service Integration to Oracle Real-time Scheduler Version 2.1 or later integration pack for the integration.

> **Note:** Updating shift information, including breaks and POUs, is not supported in offline mode.

To display shift details

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:

   - The Shift list and details for the selected shift in the right pane or work area.

   - A list in the left pane in which you can select the related items for shifts.

2. Tap a shift in the Shifts list.

   All details for the selected shift appear below the list in the work area.

3. To view the related items for the selected shift, tap the following names in the list in the left pane:

   - **Breaks.** Shows the break information for the shift. For more information, and "Starting and Ending a Break" on page 10-31.

   - **POUs.** Shows the period of unavailability (POU) information for the shift. For more information, see "Starting or Ending a Period of Unavailability" on page 10-31.

Starting and Ending a Shift

Complete the following procedure to start and end a shift.

To start and end a shift

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:

   - The Shift list and details for the selected shift in the right pane or work area.

   - A list in the left pane in which you can select the related items for shifts.

2. Tap a shift in the Shifts list.

   All details for the selected shift appear below the list in the work area.

3. Tap Start in the work area when you start the shift to record your start time and start date.

4. Tap Complete in the work area when you end the shift to record your end time.

Starting and Ending a Break

Complete the following procedure to start and end a break.

To start and end a break

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:

    ■ The Shift list and details for the selected shift in the right pane or work area.

    ■ A list in the left pane in which you can select the related items for shifts.

2. Tap a shift in the Shifts list.

    All details for the selected shift appear below the list in the work area.

3. Tap Breaks in the list in the left pane.

    All the breaks associated with the shift appear in the work area, and all details for the selected shift appear above the Break list in the work area.

4. Tap the break that you want to start or end.

5. Tap Start when you start the break to record your start time and start date.

6. Tap Complete when you end the break to record your end time.

Starting or Ending a Period of Unavailability

Complete the following procedure to start or end a shift period of unavailability (POU).

To start or end a period of unavailability for a shift

1. Tap the Side Menu icon on the application banner, and then tap Shifts to display the following:

    ■ The Shift list and details for the selected shift in the right pane or work area.

    ■ A list in the left pane in which you can select the related items for shifts.

2. Tap a shift in the Shifts list.

    All details for the selected shift appear below the list in the work area.

3. Tap POUs in the list in the left pane.

    All the POUs associated with the shift appear in the work area, and all details for the selected shift appear above the POUs list in the work area.

4. Tap the POU that you want to start or end.

5. Tap the Status field and update the field value, and then tap the save icon when finished.

Tasks Flows for Siebel Service

The Siebel Service task flows that field representatives typically carry out are divided into the following areas:

■ "Starting the Day" on page 10-32

■ "Preparing for Customer Visits" on page 10-32

■ "Performing Activities for Customer Visits" on page 10-33

■ "Closing Customer Visits" on page 10-33

■ "Performing Miscellaneous Tasks for Siebel Service" on page 10-34

Starting the Day

Field representatives typically perform the following tasks at the start of the day:

■ Review the daily schedule.

■ Review the route for the day.

For more information, see "Displaying Location Details in Siebel Mobile" on page 8-17.

■ Review the notifications list.

For more information, see "Reviewing Notification Messages in Siebel Mobile" on page 8-11.

Preparing for Customer Visits

To prepare for a customer visit, perform the following tasks:

■ Review the details about the activities that are assigned to you for the day. After you review the activities, you can accept or decline them.

For more information, see "Displaying Activity Details" on page 10-2.

■ Review the recommended parts and tools to make sure that you have all items that you need to complete the activity. If required, order any parts or tools that you need for future activities.

For information, see "Verifying and Ordering Parts and Tools for an Activity" on page 10-4.

■ Review the instructions for the activity.

For information, see "Viewing Instruction Information for an Activity" on page 10-5.

■ Review the steps needed to complete the activity.

For information, see "Viewing Step Information for an Activity" on page 10-5.

■ Review the service requests for the account so that you are aware of the customer's service history.

For information, see "Modifying Service Request Information for an Account" on page 10-21.

■ Tap Map to display the route from your current location to the customer site.

For more information, see "Displaying Activity Details" on page 10-2.

■ Select an En Route value in the Details Menu of the activity when you are traveling to the location of the activity.

For more information, see "Displaying Activity Details" on page 10-2.

■ Select an Arrive value in the Details Menu of the activity when you arrive at the location of the activity.

For more information, see "Displaying Activity Details" on page 10-2.

Performing Activities for Customer Visits

To perform the activities for a customer visit, complete the following tasks:

- Record readings.

  For more information, see "Viewing Measurement Information for an Asset" on page 10-28.

- Install nonserialized parts.

  For more information, see "Modifying Part Tracker Information for an Activity" on page 10-6.

- Remove serialized parts.

  For more information, see "Removing a Serialized Part" on page 10-7.

- Install replacement serialized parts.

  For more information, see "Installing a Replacement Serialized Part" on page 10-8.

Closing Customer Visits

To close a customer visit, complete the following tasks:

- Make sure that all steps in the activity are complete.

  For more information, see "Recording Step Completion for an Activity" on page 10-6.

- Record the time that you needed to complete the activity.

  For more information, see "Modifying Time Tracker Information for an Activity" on page 10-11.

- Record any expenses that you incurred to complete the activity.

  For more information, see "Modifying Expense Tracker Information for an Activity" on page 10-12.

- Create an invoice for the activity.

  For more information, see "Creating Invoices from Activities Using the Auto Invoice Link" on page 10-12.

- Capture the signature of the contact for an invoice.

  For more information, see "Capturing the Electronic Signature for an Invoice" on page 10-13.

- Select a Finish value in the Details Menu of the activity after you complete the work for the activity.

  For more information, see "Displaying Activity Details" on page 10-2.

Performing Miscellaneous Tasks for Siebel Service

Field representatives typically perform the following tasks:

- Create a service request for an issue that you encounter at the account site after you review the asset for the account and review any warranties and entitlements that are associated with that asset.

  For more information, see the following:

  - "Viewing Asset Information for an Account" on page 10-21
  - "Modifying Service Request Information for an Account" on page 10-21
  - "Viewing Warranty Information for an Asset" on page 10-29
  - "Viewing Entitlement Information for an Asset" on page 10-29

- Create a sales order for a service request.

  For more information, see the following:

  - "Modifying Order Information for a Service Request" on page 10-16
  - "Modifying Line Item Information for an Order" on page 10-25

- Add an activity to a service request.

  For more information, see the following:

  - "Modifying Activity Information" on page 10-3
  - "Modifying Activity Information for a Service Request" on page 10-17

- Verify that the product inventory quantity in the vehicle trunk matches the available product inventory.

  For information, see "Viewing Availability Information for a Part" on page 10-23.

- Update shift, break, and period of unavailability (POU) information.

  For more information, see the following:

  - "Starting and Ending a Shift" on page 10-30
  - "Starting and Ending a Break" on page 10-31
  - "Starting or Ending a Period of Unavailability" on page 10-31

Unsupported Features in Offline Mode

The features listed in this topic are not supported in offline mode in the Siebel Mobile disconnected application for Siebel Service. You must be connected to the Internet and, in some cases, to the Siebel Server to do the following in your Siebel Mobile disconnected application for Siebel Service:

- Use the End link for time tracker

  For more information, see "Modifying Time Tracker Information for an Activity" on page 10-11

- Use the Auto Invoice link for activity invoices

  For more information, see "Creating Invoices from Activities Using the Auto Invoice Link" on page 10-12

- Use signature display

For more information, see "Capturing the Electronic Signature for an Invoice" on page 10-13

■ Update the shift information, including breaks and periods of unavailability (POUs)

For more information, see "Displaying Shift Details" on page 10-30

For more information about the general features that are not supported in offline mode, see "Unsupported Siebel Mobile Features in Offline Mode" on page 8-42.

Index

V

validation results, viewing for calls in Siebel
Pharma,   9-10
view transition, setting for mobile applications,   8-15
views
    configuring access to for Siebel Mobile
       disconnected applications,   4-2
    limiting access to by modifying a
       responsibility,   4-3
    limiting access to for all responsibilities
       globally,   4-4
    setting up selective retrieval of,   3-14
virtual directories, adding for mobile
    applications,   3-4
visibility, designating in default Business Object
    declarations,   5-13
visibility, overriding pop-up visibility,   5-13

W

warranties, viewing for assets in Siebel
    Service,   10-29