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Siebel Fundamentals for Siebel Open UI

Siebel Innovation Pack 2014

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Preface

This guide covers fundamental concepts and tasks related to Siebel Business Applications.

Audience

This guide is intended for users, system administrators, and administrators.

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>

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Related Documents

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

- *Siebel Performance Tuning Guide*
- *Siebel Chat Guide*
- *Siebel CTI Administration Guide*
- *Siebel Email Administration Guide*
- *Siebel Release Notes* on My Oracle Support

Conventions

The following text conventions are used in this document:

Convention	Meaning
<i>italic</i>	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.

What's New in This Release

This chapter describes new product features.

What's New in Siebel Fundamentals for Siebel Open UI, Siebel Innovation Pack 2014

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 *What's New in Siebel Fundamentals for Siebel Open UI, Siebel Innovation Pack 2014*

Topic	Description
"Logging In to the Siebel Application" on page 2-1	Modified topic. It includes information about the HTML5 Browser Compatibility link.
"About the Side Menu" on page 3-2	New topic. It includes information about navigating in the Siebel Open UI client using the side menu.
"About the Action Pane" on page 3-4	New topic. It includes information about the action pane.
"About the Second Level View Bar" on page 3-6	Modified topic. It includes new information about navigating in the Siebel Open UI client.
"About the Menu Toolbar" on page 3-16	New topic. It includes information about the menu toolbar.
"About the Communications Panel" on page 3-16	New topic. It includes information about the communications panel.
"About Check Boxes" on page 4-3	Modified topic. It includes information about check boxes.
"Tips for Queries" on page 7-10	Modified topic. It includes information about using check boxes in queries.
"About iHelp" on page 7-11	New topic. It includes information about iHelp.
"Using iHelp to Complete Tasks" on page 7-11	New topic. It includes information about using iHelp to complete tasks.
"Using the iHelp Map" on page 7-12	New topic. It includes information about using the iHelp Map.

Table 1–1 (Cont.) What's New in Siebel Fundamentals for Siebel Open UI, Siebel Innovation Pack 2014

Topic	Description
"About the Calendar" on page 11-2	Modified topic. It includes information about the calendar all day slot, and workday
"About Viewing Calendar Availability" on page 11-7	New topic. It includes information about viewing availability in calendar.
"About Using the Participant Availability Subview" on page 11-6	New topic. It includes information about using the Participant Availability subview in calendar.
"Adding Participants to Activities" on page 11-14	Modified topic. It includes updated information about adding participants to activities.
"Removing Participants from Activities" on page 11-15	Modified topic. It includes updated information about removing participants to activities.
"Setting Navigation Options" on page 13-3	Modified topic. It includes information about the Side Menu icon, and how to modify navigation options.
"Customizing the Length of a Workday" on page 13-13	Modified topic. It includes information about colored start and end time lines for workday hours.
"Setting Up Default Participant Chart Display" on page 13-15	New topic. It includes information about setting up default participant chart display.
"Locking List Columns" on page 6-19	New topic. It includes information about locking columns in a list view.

What's New in Siebel Fundamentals for Siebel Open UI, Version 8.1/8.2

Table 1–2 lists the changes described in this version of the documentation to support this release of the software. The new features described in Table 3 are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 1–2 What's New in Siebel Fundamentals for Siebel Open UI, Version 8.1/8.2

Topic	Description
"Printing Records" on page 6-8	Modified topic. It includes information about the Quick Print button.
"Spell Checking Fields in Records" on page 6-13	New topic. It includes information about performing a spell check in records.
"Creating Shortcuts to Siebel Records" on page 10-6	New topic. It includes information about creating shortcuts to Siebel records.
"Adding Participants to Activities" on page 11-14	New topic. It includes information about adding participants to activities.
"Removing Participants from Activities" on page 11-15	New topic. It includes information about removing participants from activities.
"Setting Quick Print Options" on page 13-5	New topic. It includes information about setting the quick print options.
"Changing Default Spell Check Options" on page 13-8	New topic. It includes information about changing the default options for spell checks.
"Setting Up Email Prompts for Meetings" on page 13-13	New topic. It includes information about setting up email prompts for meetings.
"Calendar Control Keyboard Shortcuts" on page 14-6	New topic. It includes information about the keyboard shortcuts for the calendar control.

Table 1–2 (Cont.) What's New in Siebel Fundamentals for Siebel Open UI, Version 8.1/8.2

Topic	Description
" Calculator Control Keyboard Shortcuts " on page 14-6	New topic. It includes information about the keyboard shortcuts for the calculator control.
" About Screen Readers " on page A-2	Modified topic. It includes information about the levels of the view bar region.
" About the Resource Scheduler " on page 3-7	New topic. It includes information about the Resource Scheduler.
" Setting Transition Effects " on page 13-3	New topic. It includes information about configuring transition effects.
" Setting Scroll Speeds " on page 13-3	New topic. It includes information about configuring scroll speeds for tile applets.
" About Section 508 Accessibility " on page A-1	Modified topic. It includes updated information about Section 508 Accessibility.

Getting Started with the Siebel Application

This chapter describes how to get started with the Siebel application from Oracle. It includes the following topics:

- [Logging In to the Siebel Application](#)
- [About Access and Responsibilities in the Siebel Application](#)
- [Using Browser Features](#)
- [Logging Out of the Siebel Application](#)

Logging In to the Siebel Application

You access the Siebel Web Client application using a URL provided by your organization.

[Figure 2–1](#) shows an example of the login screen.

Figure 2–1 Example of the Login Screen

ORACLE®

User ID

Password

Remember my User ID

Login

Siebel Call Center Innovation Pack 2014

Accessibility

▶ [HTML5 Browser Compatibility](#) ⓘ

To log in to the Siebel application

1. Use your browser to navigate to the URL provided by your organization.
A login screen appears.

Note: The language of the application screens is controlled by language codes. Language codes used by Siebel Business Applications use a three-letter code, such as ENU for U.S. English, FRA for French, THA for Thai, and so on. Your Siebel administrator provides the URL for the language you want. For more information about global deployments of Siebel Business Applications, see *Siebel Global Deployment Guide*.

2. Enter your user ID and password.
Contact your Siebel administrator if you are not sure of your user ID or password.
3. (Optional) To save your user ID, select the Remember my User ID check box.
For more information about the Remember my User ID option, see *Siebel Security Guide*.
4. (Optional) Click 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 click 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 this incompatibility.
5. Click the Login button.
6. If the Siebel Browser Check dialog box appears, then follow the on-screen instructions.

Note: If the setting zone in your browser is set to medium or higher, then you might see a security warning window when you launch the Siebel application. To remove this window and make sure it does not appear again, check the Always trust content from Oracle check box.

About the Demo Application

If your organization sets up access to the Sample database, and you are running the Siebel Mobile Web Client, then you can familiarize yourself with the Siebel application through the demo version. The demo application automatically logs you in and connects you to the Sample database. You can add and delete information in the Sample database while becoming familiar with the Siebel application.

About the Home Page

After you log in to the Siebel application, your home page appears. Your home page shows items that are most useful to you while you use the Siebel application. For example, your home page can show service requests if you are a call center agent, opportunities if you are a salesperson, or a list of your daily activities. You might also want to see your daily calendar so you can manage your daily appointments.

The records that appear in the My lists on the home page are determined by default criteria that are set by your Siebel administrator. For more information about how the records in these lists are filtered, contact your Siebel administrator.

The information on your home page is determined by your organization. However, you can remove and rearrange the home page elements to better manage the information and determine what you see. For more information, see "[Customizing Home Pages](#)" on page 12-1.

About Access and Responsibilities in the Siebel Application

You are assigned an employee login on the server with a unique ID and password. The login assigned to you defines your job responsibilities, and the data you can access to fulfill those responsibilities, when you log in to the Siebel application.

Responsibilities are defined for you by your Siebel administrator. They determine the collection of *views* you see. For example, if you are a sales manager, then you need views to manage your team's accounts, contacts, and opportunities, but your sales representatives do not need these views.

A *position* is the basis for determining the *data* you can access. It allows you to see certain records but not other records. The position represents an assigned job title within an organization. By assigning you a position (job title), the Siebel administrator can determine the set of data you see. For example, a South American vice president of sales does not see the same data as a North American sales representative.

The following factors can determine the records you see:

- A record can be assigned an owner, meaning that it can be assigned to only one person. Only the owner of the record can see it. This type of record is called a *personally owned record* because only one user can own the record.
- A record can be assigned to a team. Only the people who are team members in the team for the record can see the record.
- Companies can distribute records by organization. For example, users in the South American region of an organization see only records for South America. Companies with channel partners can also use organizations to partition data, allowing their partners to access only the data that they need.

Using Browser Features

To view the screens and views that you previously accessed in your current session, you can click the back and forward buttons in your browser. To find browser screens that you recently accessed in the Siebel application, use the history feature for your browser, and click the link you want from the list.

You can use the zoom feature in your browser to control how you see screen content, and you can use the print feature in your browser to print records. For more information, see "[Printing Records](#)" on page 6-8.

To refresh data in the Siebel application, press F5. Using the Refresh button in your browser resubmits the current URL, and new data can appear in the application window.

The Siebel application also rebuilds the memory cache (view layouts). These view layouts are your most frequently used views. For more information about view layouts and the memory cache, see *Siebel Performance Tuning Guide* on Oracle Technology Network

(<http://www.oracle.com/technetwork/indexes/documentation/index.html>).

Logging Out of the Siebel Application

After you use the Siebel application, you exit it.

To log out of the Siebel application

- From the application-level menu, choose File, then Log Out.

Note: Do not close the browser window to exit the Siebel application.

About the User Interface

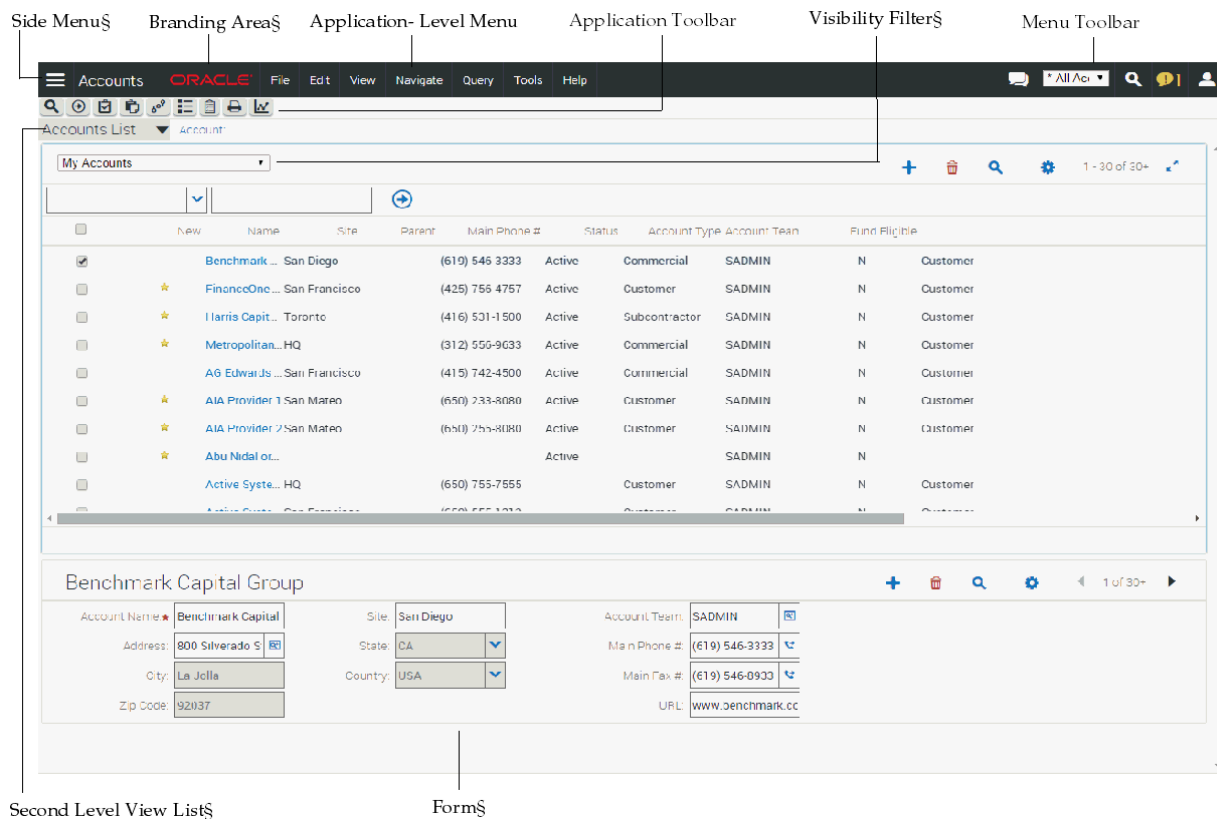
This chapter describes how to use the user interface. It includes the following topics:

- [About Elements of Siebel Application Window](#)
- [About Keyboard Navigation](#)
- [About the Side Menu](#)
- [About the Branding Area](#)
- [About the Application-Level Menu](#)
- [About the Application Toolbar](#)
- [About the Site Map](#)
- [About the Action Pane](#)
- [About Screens](#)
- [About Home Pages for Screens](#)
- [About the Second Level View Bar](#)
- [About the Resource Scheduler](#)
- [About Explorer Views](#)
- [About Charts](#)
- [About Views and Subviews](#)
- [About Lists](#)
- [About Forms](#)
- [About Common Buttons in Lists and Forms](#)
- [About the Menu Toolbar](#)
- [About the Communications Panel](#)
- [About Notifications](#)
- [About the Saved Queries Drop-Down List](#)

About Elements of Siebel Application Window

Figure 3-1 shows the main elements of an example of the Siebel application window.

Figure 3–1 Example of the Siebel Application Window



About Keyboard Navigation

The following keys facilitate keyboard navigation in Siebel Business Applications:

- **TAB and TAB+SHIFT.** Press TAB to navigate forward and TAB+SHIFT to navigate backward between widgets (interface elements, such as the application menu and the application toolbar).
- **Arrow keys.** Press the arrow keys to navigate within a widget (such as within a list applet, within a form applet, within a drop-down list, and so on).
- **ENTER.** Press ENTER to navigate to the screen if the focus is on the screen or to navigate to the view if the focus is on the view.
- **ESC.** Press ESC to close an interface element, such as a calendar control, a calculator control, and so on, without saving changes in the interface element. Also, press ESC to cancel an operation, such as an operation to create a query or to create a new record.

You can also use keyboard shortcuts to navigate in the user interface, but you might find these keys easier to remember and use than keyboard shortcuts. For more information about keyboard shortcuts, see ["Using Keyboard Shortcuts"](#) on page 14-1.

About the Side Menu

The Side Menu button appears at the top left side of the Siebel application. It is characterized by three horizontal lines stacked on top of one another. Click the Side Menu button to view a list of available screens.

About the Branding Area

In the preconfigured application, the branding area is located in the top left corner of the application window and shows the Oracle logo. In your application, the branding area might not be in this location and might show your company logo.










About the Application-Level Menu

The application-level menu is located in the top left corner of the application window. The functionality provided by each menu in the application-level menu depends on the Siebel application and the configuration you use. Each menu option lets you perform a task. Look for topics in this document that explain the task you want to perform to find out how you can use a menu and its options.

About the Application Toolbar

The application toolbar appears below the application-level menu. [Table 3-1](#) describes the tools available on the application toolbar.

Table 3-1 Application Toolbar Controls

Control	Name	Description	Related Information
	New Query button	Starts a new query.	Chapter 7, "Locating Information Using Query and iHelp"
	Execute Query button	Executes a query.	Chapter 7, "Locating Information Using Query and iHelp"
	Apply Target List button	Applies a target list to a view.	<i>Siebel Applications Administration Guide.</i>
	Save Target List button	Creates a target list.	<i>Siebel Applications Administration Guide.</i>
	Site Map button	Displays the Site Map.	"About the Site Map" on page 3-4
	How Do I button	Accesses iHelp, which provides guidance with tasks.	"About iHelp" on page 7-11
	Tasks button	Activates a Task UI wizard to guide you through a series of steps to complete a specific task.	Chapter 8, "Using Task UI"
	Quick Print button	Prints the data you are currently viewing. Your user preferences can disable this button.	"Printing Records" on page 6-8 and "Setting Quick Print Options" on page 13-5
	Reports button	Accesses reports for the screen you are working in.	"Running Reports" on page 10-1

About the Site Map

Your organization determines the screens appear in the application window. These screens might be only a subset of the available screens. You access a screen by clicking the Side Menu icon, then selecting the related screen from the list screens, or by using the Site Map.

If the screen tab you require does not appear in the screen tabs, then you can show that screen tab with the other screen tabs so that you can easily access it. For more information about how to show screen tabs, see ["Showing, Hiding, and Reordering Screens or Views"](#) on page 13-11.

Using the Site Map

To see a list of all the screens available to you, use the Site Map.

To navigate to a screen using the Site Map

1. Do one of the following:
 - From the application-level menu, choose Navigate, then Site Map.
 - Click the Site Map button on the application toolbar.
2. (Optional) To restrict the hyperlinks that appear in the Site Map, enter appropriate text in the field for searching.

3. In the Site Map, click the hyperlink for the screen you want to navigate to.

The Site Map displays the screen name and all the view names available in that screen.

4. Click a hyperlink to navigate to the screen or view.

About the Action Pane

You can access the individual Action Pane controls in one of the following ways:

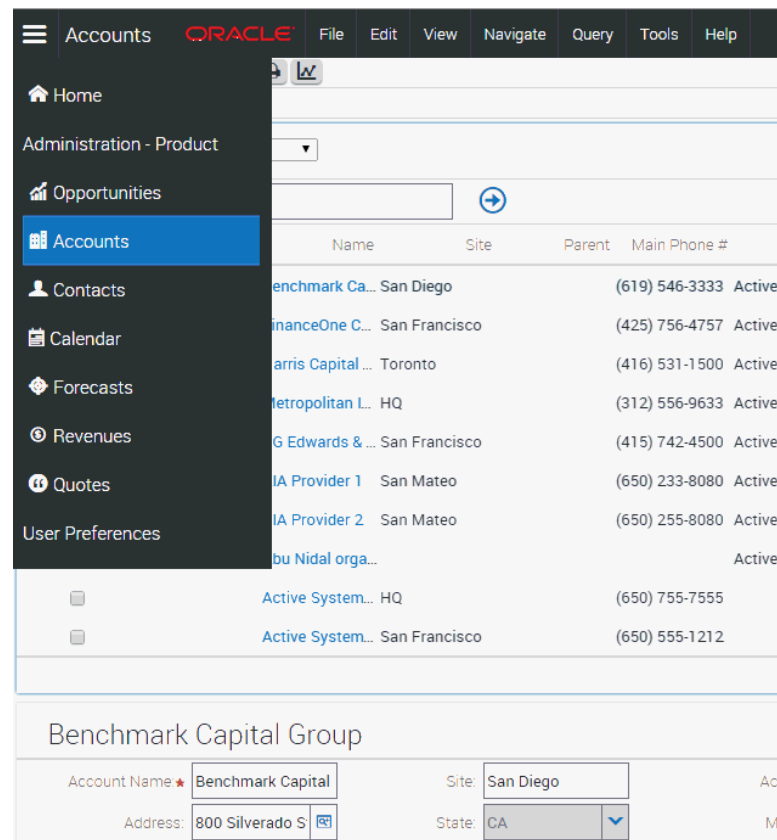
- Click on the appropriate button on the application toolbar.
These buttons include the How Do I button and the Tasks button.
- From the application-level menu, choose View, then Action Pane.
The menu items are checked if the corresponding pane is open.

The state of the Action Pane is retained across your sessions. For example, if the Action Pane is open in Task mode when you exit the Siebel application on Monday night, then the Action Pane is open in Task mode when you log in on Tuesday morning.

About Screens

Information in the Siebel application is organized into screens. You access a screen by clicking the appropriate screen from the Side Menu, such as Opportunities, Calendar, or Accounts, and by using the Site Map.

[Figure 3-2](#) shows the Side Menu with the list of available screens.

Figure 3–2 Example of the Side Menu and List of Available Screens

The active screen frequently appears in a different color than the color for the other screens in the list. In [Figure 3–2](#), the active screen tab is Accounts.

You can also use the Site Map to navigate to a screen. If you select from the Site Map a screen that does not appear in the screen list, it will appear in the screen list once you navigate to that screen. This screen is visible only for the current session. For more information, see ["About the Site Map"](#) on page 3-4.

You can specify the screens that appear in the Siebel application. For more information, see ["Showing, Hiding, and Reordering Screens or Views"](#) on page 13-11.

A Siebel administrator can change the screen tab icons in Siebel Tools. If you do not want to display icons on the screen tabs, then contact your Siebel administrator.

You can also configure your Siebel application to show screen tabs across the top of the screen, or in a tree format on the left side of your screen. For more information, see ["Setting Navigation Options"](#) on page 13-3.

About Home Pages for Screens

A screen home page is a gateway to the common functions for that screen. [Table 3–2](#) describes the main elements in screen home pages.

Table 3–2 Main Elements for Screen Home Pages

Element	Description
Edit Layout button	A button that you click to configure the areas that appear on the screen home page. For more information, see "Editing the Layout of Home Pages" on page 12-1.
Frequently Viewed <i>Screen name</i>	An area that contains a list of links to the lists of data with which you most frequently work. This list can be a combination of predefined queries and visibility filters.
Recent Records	Recent items area that contains a list of the last five records that you accessed (by drilling down on the record), created, or modified. This area allows you to return to a recent record with a single click. Recent records are stored in your user preferences.
iHelp	Task area that contains a list of links to the most important tasks for the screen. When you drill down on a task, iHelp is launched to guide you through the completion of the task.
Add	Add area that you use to add new records. You complete the fields, and click Add & Go to add the record to the database and navigate directly to the form containing the new record you add.

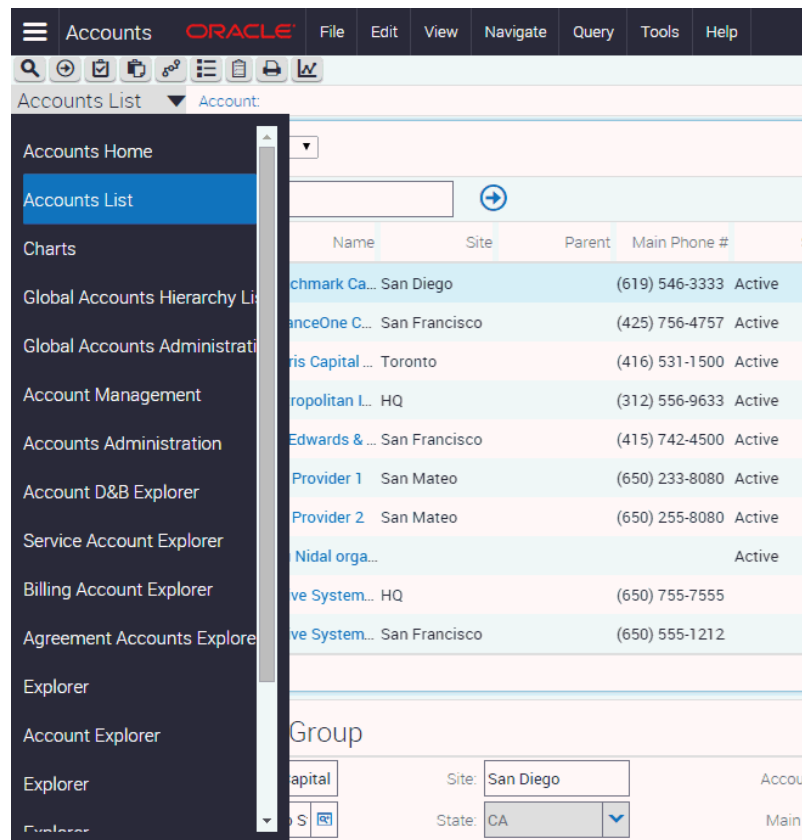
Note: Multi-Value Groups (MVGs) are not supported on Rapid Search or Rapid Add applets.

Related Topics

- [Chapter 12, "Customizing Home Pages"](#)
- ["Setting Up View Links for Screen Home Pages"](#) on page 13-10

About the Second Level View Bar

Screens contain sets of information in views. These views display data in different formats. For example, you can sometimes view the same data in an explorer view, in a chart, or in a list. You access these views by clicking the second level view bar. The second level view bar is immediately below the application toolbar, on the left side of the screen. [Figure 3–3](#) shows an example of the second level view bar with a list of available views.

Figure 3–3 Example of the Second Level View Bar and a List of Available Views

The active view appears in a different color in the view list. In [Figure 3–3](#), the active view is Account List. If the view you want to use is not visible, then use the scroll down arrow on the right side of the list to display and select that view.

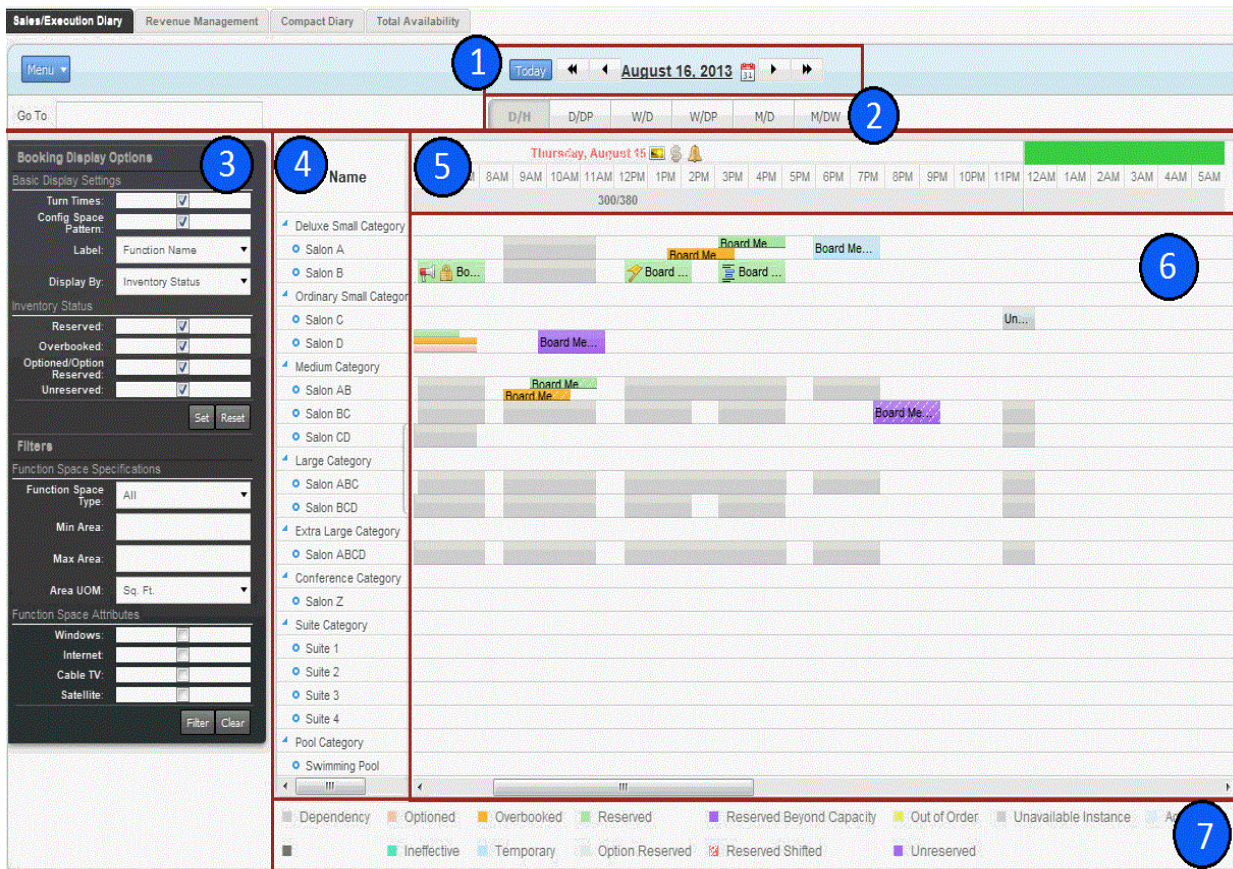
You can configure your Siebel application to show screens and views in tab format at the top of your screen or in tree format on the left side of your screen. For more information, see ["Setting Navigation Options"](#) on page 13-3.

About the Resource Scheduler

A Resource Scheduler is a type of bar chart that illustrates a schedule. You can access the Resource Scheduler by navigating to the Function Space Diary screen.

[Figure 3–4](#) displays a Resource Scheduler and uses the floor plan of a hotel as an example. The Resource Scheduler sets values according to this example. You can use your own values to meet your deployment requirements.

Figure 3–4 Example of a Scheduler



Explanation of Callouts

The Resource Scheduler includes the following items:

1. **Date navigation bar.** Enables the user to modify the date displayed in the schedule.
2. **Timescale selector.** Includes the following:
 - **D/H.** Days and hours
 - **D/DP.** Days and day parts
 - **W/D.** Weeks and days
 - **W/DP.** Weeks, days, and day parts
 - **M/D.** Months and days
 - **M/DW.** Months, days of the week, and day parts

A *day part* is a time period that occurs during the day. For example, morning, afternoon, evening, and night are day parts. You can customize the time period that defines a day part. For example, the morning day part comes predefined as 8:00 AM to Noon. You can modify it to another time period, such as 9:00 AM to Noon.

3. **Display options / Filter pane.** Enables the user to modify display options and set filters.

4. **Resource pane.** Displays a list of resources. A resource is something that the Resource Scheduler can use to support an event. A room is an example of a resource. An event is something that occurs in the Resource Scheduler. A meeting is an example of an event.
5. **Timescale pane.** Displays a timescale pane that includes date and time information. It includes the following items:
 - The *major axis* is a dimension that appears in the timescale pane. In [Figure 3–4](#), the major axis displays Thursday, August 15.
 - The *minor axis* is a dimension that appears in the timescale pane. In [Figure 3–4](#), the minor axis displays the time of day, such as 10AM.
 - The *third axis* is a dimension appears in the timescale pane. It displays this axis as a third dimension in addition to the major axis and the minor axis. You can use the third axis to display Siebel CRM information according to your deployment requirements. In [Figure 3–4](#), the third axis displays the total number of rooms that are available in the resource for the current day. For example, 300/380 indicates that 300 rooms out of a total of 380 rooms are available for the current day.
6. **Schedule pane.** Displays the schedule as a timeline. It includes events that are scheduled for each resource.
7. **Legend.** Displays a legend that describes the meaning of each color that appears in the Schedule pane.

An *abbreviation* is a shortened version of a value that you can specify in the Value property of an object that the Resource Scheduler uses. ST is an example of an abbreviation. It indicates the start time of the Resource Scheduler. Siebel Open UI uses these abbreviations to reduce the volume of data transmission that occurs during communication from the Siebel Server to the client.

About Explorer Views

An explorer view displays data in a compact hierarchical format. Typically, you can access an explorer view by clicking an explorer view in the view list below

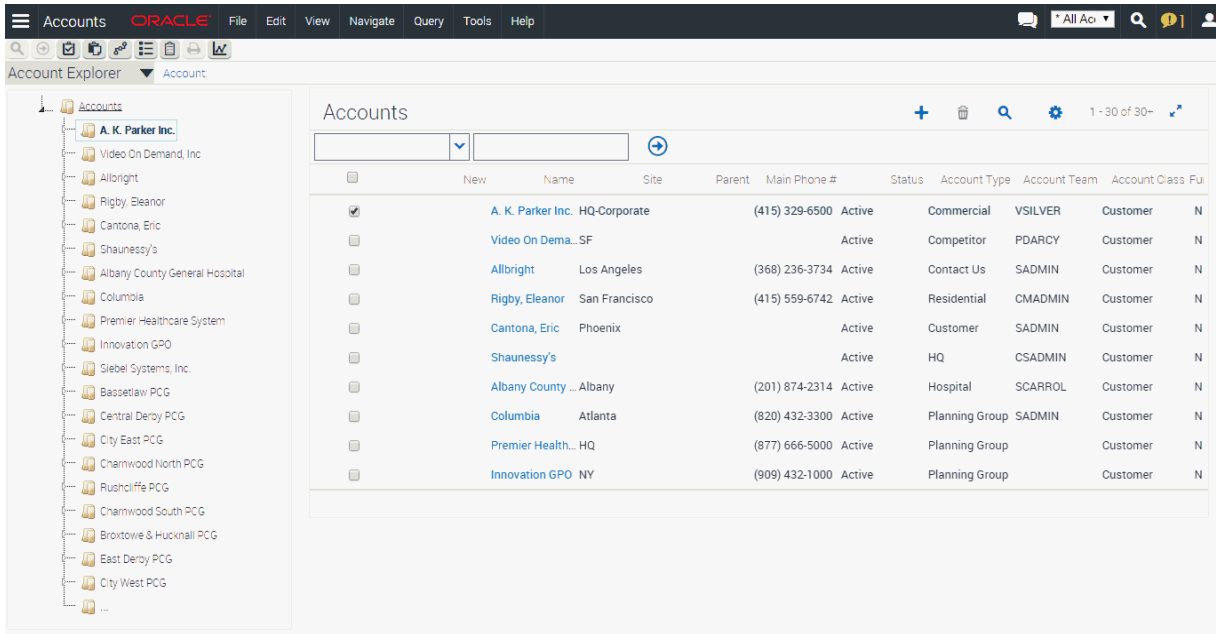
[Figure 3–5](#) shows an example of an explorer view.

An explorer view is an expandable tree view. The tree control appears in the left pane of the content area. You select the control for the tree branch that you want to view, and the detail information for that tree branch appears in the right pane.

A folder in the tree preceded by an arrow contains other folders. Click the arrow to expand the folder and show its contents. The list in the right pane always shows the contents of the selected folder in the tree control. Click to the left of a folder to collapse the folder.

Note: If you cannot access a parent record, then you cannot access any of that record's child or grandchild records in an explorer view, even if you can access the child or grandchild records in other views.

Figure 3-5 Example of an Explorer View

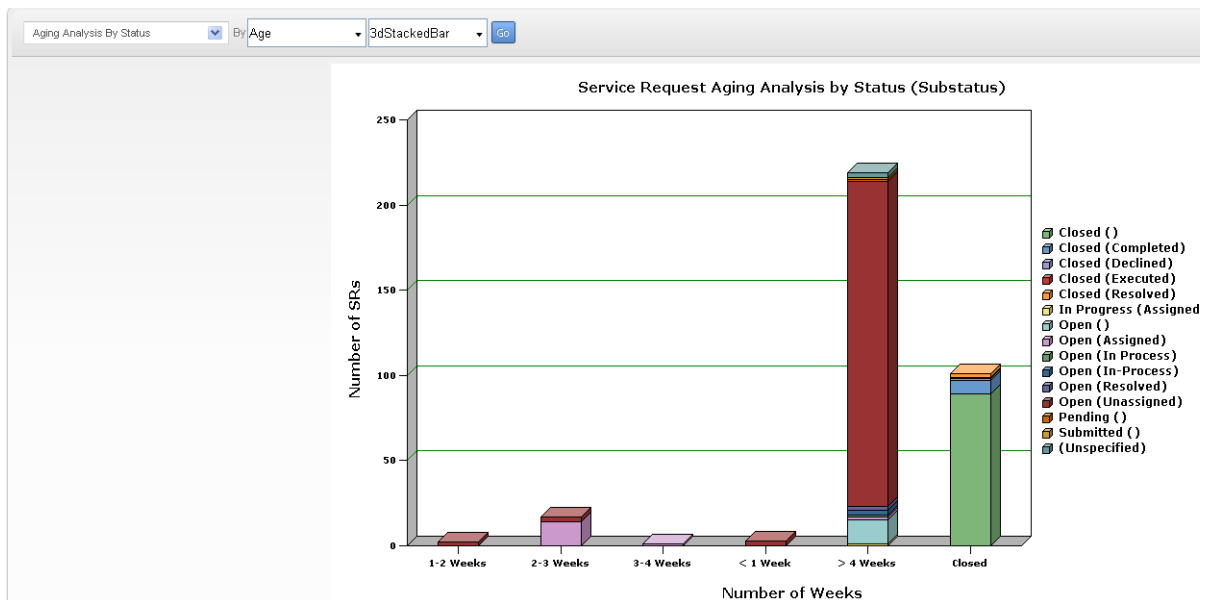


About Charts

Data can appear in chart format. Charts are graphical representations of data and are available as views in some screens. Use charts to compare data sets. Typically, you can access a chart by clicking the charts hyperlink on the link bar below the screen tab.

Figure 3-6 shows an example of a chart.

Use the drop-down list at the top of the chart to determine the data to include in the chart. Most charts also include a drop-down list of chart types from which you can select the format of the chart, for example, a bar chart or a pie chart.

Figure 3–6 Example of a Chart

Saving Charts

You can save charts in the Siebel application for use in other applications, for example, in Microsoft PowerPoint. When you save a chart, you have a copy of the chart that you can include in presentations, documents, or other places where you might want to display it.

To save a chart

1. Navigate to the chart you want to save.
2. CTRL + ALT + Right-click on the chart, and select Save Image As.
3. In the dialog box that appears, do the following:
 1. Navigate to the location where you want to save the chart.
Do not change the default file name, or enter a new name in the File name field.
 2. Select an image type from the drop-down list for the Save as type field.
 3. Click Save.

About Views and Subviews

Views exist within screens and can contain lists, forms, charts, explorer views, subviews and so on.

After selecting the screen, you must determine the set of records you want to view in the selected screen. In some cases, a screen home page appears. In other cases, a default set of records appears in a list. In these other cases, you can use the visibility filter to access a different set of records.

You use third level view bar after you drill down on a field in the record you want to view or change. The third level view bar allows you to select a subview that show

detailed presentations of data related to the selected record. In some cases, subviews provide access to additional information about a record.

This topic contains the following information:

- ["About Using the Visibility Filter in Lists"](#) on page 3-12
- ["About the Third Level View Bar"](#) on page 3-12
- ["About Subviews"](#) on page 3-13

Related Topics

- ["About Lists"](#) on page 3-13
- ["About Forms"](#) on page 3-15
- ["About Charts"](#) on page 3-10
- ["About Explorer Views"](#) on page 3-9

About Using the Visibility Filter in Lists

The visibility filter, which appears in list headers, lets you access a set of records by filter values, such as My Accounts, My Team’s Accounts, and so on.

For example, you want to query for information about an account. However, you do not own the account. The default filter value for the Accounts screen is My Accounts, which displays only your account records. To see every account record that you can access, use the visibility filter to choose the All Accounts filter value. You can then see the account records that you can access.

[Table 3–3](#) describes each filter value in the visibility filter. In this table, the Accounts screen is used as an example, but these filters can appear in any screen. Because of your responsibilities, you might not see some filters in this table.

Note: *My* views show your login name in the Team field if the field appears in the view. *All* views show the login name of the primary team member in the Team field if the field appears in the view.

Table 3–3 Visibility Filter Values

Filter	Description
My Accounts	Shows items that are specific to you. You are the only user who can see these items, unless you are a member of a team that can access them.
My Team’s Accounts	Allows a manager to look at the items belonging to that manager’s team. For example, a manager can select the My Team’s Accounts visibility filter and view the accounts that each team member is currently working on. You cannot add a new record to My Team’s Account view unless users report to you.
All Accounts	Allows you to view all accounts that you are permitted to access.
All Accounts Across Organizations	Allows a user with the appropriate responsibilities to view all of the accounts in all of the companies. This view is for companies that have partnerships with other companies.

About the Third Level View Bar

The third level view bar appears in the bottom part of the application window after you drill down on a field in a record. Clicking on the third level view bar reveals a list

of available third level views. Click a third level view to display the data for the drilldown record. For example, if you are viewing a contact in the Contacts screen, then clicking the Activities third level view displays the activities associated with the contact. The third level view bar looks similar to the second level view bar, except its placement is further down the screen.

An active third level view tab appears in a different color than the color for the other view tabs. If the view you want to use is not visible, then use the scroll down arrow on the right side of the list to display and select that third level view.

You can specify the third level views that appear in the Siebel application. For more information, see ["Showing, Hiding, and Reordering Screens or Views"](#) on page 13-11.

About Subviews

Subviews appear directly below the displayed information for a selected third level view. A subview provides more details about the selected record in the view. Not all third level views have subviews. If a view has a subview, then the subview appears automatically.

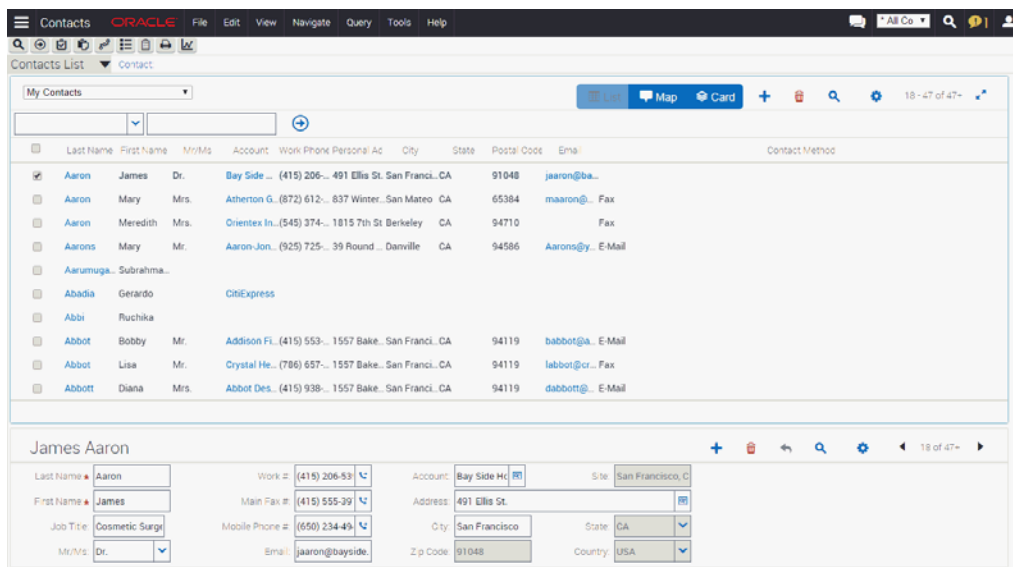
About Lists

A list consists of multiple records, presented as rows. For information about determining the number of records in a list, see ["Displaying Record Count"](#) on page 6-9.

Each record consists of multiple fields. The first record in a list is selected and highlighted a color (for example, blue) when you access the list. You can select a record in a list by clicking any field in the record. Your selection highlights the selected record. If you select other records, then the last record you select is highlighted in blue, and the other records you select are highlighted in yellow. If the field you click is editable, then the field converts to edit mode, and you can enter a value in the field.

[Figure 3-7](#) shows an example of a list.

Figure 3-7 Example of a List



In a list, you scroll vertically and horizontally to view data.



This topic contains the following information:

- ["About Navigating Between Records in a List"](#) on page 3-14
- ["About Horizontal Scrolling in Lists"](#) on page 3-14
- ["About Expanding and Collapsing Lists"](#) on page 3-14

About Navigating Between Records in a List

Use the navigation buttons that appear at top right side of the form below the list to navigate between the records in the list. [Table 3-4](#) describes the navigation buttons.

Table 3-4 Description of Vertical Navigation Buttons

Button	Description
	Navigates to the previous record.
	Navigates to the next record.

The record number range for a list appears in the top right corner of the list, and shows the number range for the records that appear in the list. The record number range changes as you navigate between the records in the list. An estimate of the total number of list records appears to the right of the record number range. You must scroll to the end of the list to see the exact total number of list records to the right of the record number range. [Figure 3-8](#) shows an example of the record number range and the total number records for a list.

Figure 3-8 Example of the Record Number Range and the Total Number of Records for a List

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About Horizontal Scrolling in Lists

Use the horizontal scroll bar to navigate through all of the columns in a list. The horizontal scroll bar appears above the vertical navigation buttons in lists that contain more columns than can fit on the screen. For information about designating the columns that appear on the screen, see ["Organizing List Columns"](#) on page 6-16.

About Expanding and Collapsing Lists

Every list has a show more button or a show less button in the top right corner. Clicking the show more or show less button allows you to see more or fewer records in a list. [Table 3-5](#) describes the show more and show less buttons.

Table 3-5 Description of Show More and Show Less Buttons



Button	Description
	Displays more records to expand a collapsed list.

Table 3–5 (Cont.) Description of Show More and Show Less Buttons

Button	Description
	Displays fewer records to collapse an expanded list.

About Forms

A form that appears below a list contains the data for the record you select in the list. Also, when you drill down on a field in a record in a list, you see a form at the top of the screen that contains data for the record you drill down on. A form contains the data for one record. [Figure 3–9](#) shows an example of a form.









If you are authorized to edit the information in a form, then you can change field data directly in the form. Step off the form to save your changes. All required fields appear with a star icon next to the field name in the form.

In some cases, you can click the show more button to access a long form, and then click the show less button to access the short form. These buttons appear in the top right corner of the form. For examples of the show more and show less buttons, see "[About Expanding and Collapsing Lists](#)" on page 3-14.

Figure 3–9 Example of a Form

Meredith Aaron

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Last Name:★ Aaron	Work #: (545) 374- 	Account: Orientex 	Site:
First Name:★ Meredith	Main Fax #: (415) 321- 	Address: 1815 7th St 	
Job Title: Office Manag	Mobile Phone #: (987) 232- 	City: Berkeley	State: CA 
Mr/Ms: Mrs. 	Email:	Zip Code: 94710	Country: USA 

The record navigation buttons are located in the top right corner of each form. Use the left arrow button to navigate to the previous form record and the right arrow button to navigate to the next form record.

The record number for a form appears in the top right corner of the form between the record navigation buttons. The record number changes as you navigate between forms. An estimate of the total number of form records appears to the right of the record number. You must navigate to the last form to see the exact number of form records to the right of the record number.

About Common Buttons in Lists and Forms

Buttons appear at the top of lists and forms. [Table 3–6](#) describes these buttons. Your Siebel application might contain additional buttons or other elements on each list and form.

Table 3–6 Common Buttons in Lists and Forms





Button	Name	Description
	Menu	Accesses a menu of options that apply to the active form, list, explorer view, or selected record in a list. Using the options in the menu, you can perform actions such as copying, deleting, and advanced sorting.

Table 3–6 (Cont.) Common Buttons in Lists and Forms

Button	Name	Description
	New	Creates a new record. In a list, clicking this button inserts a new, empty row at the top of the list so you can create a new record. In a form, clicking this button displays a form with empty fields that you can fill in to create a new record.
	Delete	Deletes the selected record.
	Query	Starts a query in a form or list so that you can specify query criteria. For more information about querying, see Chapter 7, "Locating Information Using Query and iHelp."

About the Menu Toolbar

When using the Siebel Open UI Client in Siebel Innovation Pack 2014 and later, the menu toolbar appears at the top right side of display area.

[Figure 3–10](#) shows the menu toolbar.

Figure 3–10 Example of the Menu Toolbar

The following list describes the five areas of the menu toolbar, from left to right:

- **The communications icon.** Click on this icon to open the communications panel. For more information, see ["About the Communications Panel"](#) on page 3-16.
- **The saved queries drop-down list.** Click on the drop-down list to access contextual saved queries. For more information, see ["About the Saved Queries Drop-Down List"](#) on page 3-18.
- **The magnifying glass icon.** Click on this icon to open the query control. For more information, see ["About the Query Control"](#) on page 3-19.
- **The notification icon.** Click on this icon to open the Notification Summary pane. For more information, see ["About Notifications"](#) on page 3-17.
- **The settings icon.** Click on this icon to change your settings or to logout.

About the Communications Panel

The communications panel can be accessed by clicking the communications icon on the menu toolbar of the Siebel Open UI Client. For more information about the menu toolbar, see ["About the Menu Toolbar"](#) on page 3-16.

The communications panel contains a header area, the communications toolbar, the customer dashboard and the chat panel. Your communications panel might not contain all of these elements, depending on your deployment the Siebel Open UI Client.

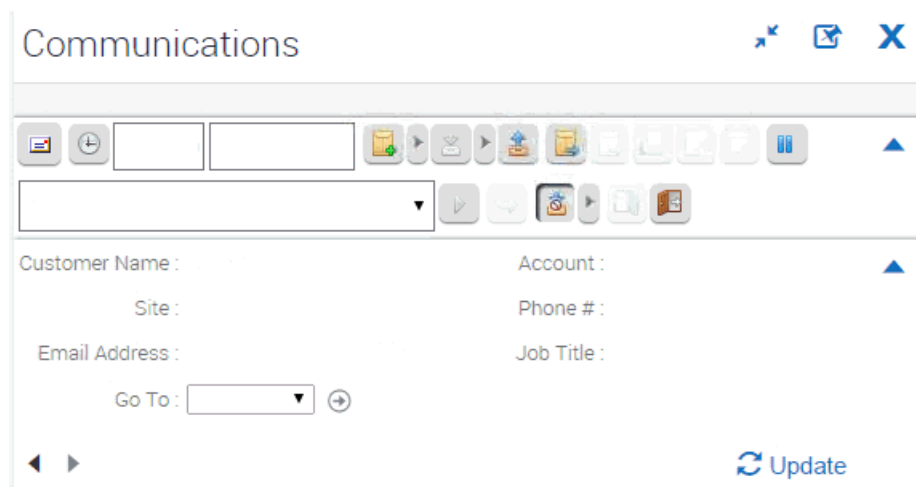
The communications panel can appear in a docked position or as a floating pane in the Siebel Open UI Client. It can be docked and undocked by clicking the push-pin icon.

When the communications panel is floating, it can be dragged anywhere within the confines of the main Siebel Open UI Client area.

Users can control the size of the communications panel by clicking on the widen and narrow icons. Users can close the communications panel by clicking the close (X) icon.

[Figure 3–11](#) shows an example of the communications panel.

Figure 3–11 Example of the Communications Panel



For more information about the communications panel and the communications toolbar, see *Siebel CTI Administration Guide*. For more information about the chat panel and the customer dashboard see *Siebel Chat Guide*.

About Notifications

Managers and the Siebel administrator can use notifications (or broadcast messages) to communicate information to their direct reports and to others in the organization. If the Siebel administrator provides you with the proper authority, then you can customize the behavior of notifications in your user preferences. For more information, see "[Customizing Aspects of Notifications](#)" on page 13-9.

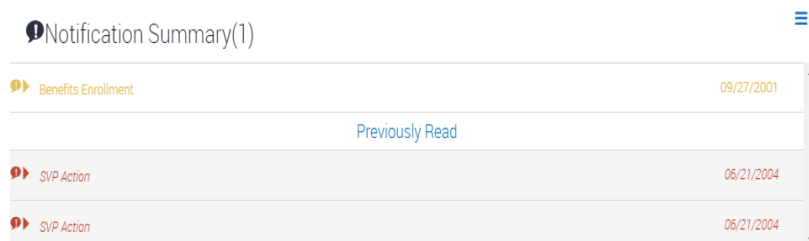
This topic contains the following information:

- "[About the Notification Icon and Panes](#)" on page 3-17
- "[About Colors for Notifications](#)" on page 3-18

About the Notification Icon and Panes

You can access notifications by using the Notification icon on the menu toolbar. For more information about the menu toolbar, see "[About the Menu Toolbar](#)" on page 3-16. If this icon is blinking, then you have at least one unread message with a level of importance (or severity) of Urgent with Alert.

When you click the Notification icon, the Notification Summary pane appears listing the summary text of each message. [Figure 3–12](#) shows an example of the Notification Summary pane.

Figure 3–12 Example of the Notification Summary Pane

When you expand the notification by selecting the arrow to the right of the notification in the Notification Summary pane, the details appears for that message. A blinking Notification icon stops blinking when the Notification Details pane appears. Read messages are not included in the message number that appears in the Notification icon.

In the Notification Summary pane, unread messages appear at the top of the pane and are sorted by message date with later messages listed before earlier messages. Read messages appear in italic text below the unread messages and are also sorted by message date with later messages listed before earlier messages.

About Colors for Notifications

Colors in notifications indicate the level of importance (or severity) of the message or of specific text in the message. [Table 3–7](#) describes the level of importance for each color in the preconfigured Siebel application.

Table 3–7 Colors for Notifications

Color	Level of Message Importance
Gray	Normal
Yellow	High
Red	Urgent
Red	Urgent with Alert

The color for the level of message importance applies the message text in the Notification Summary pane. If specific message text in the Notification Details pane is tagged with a level of importance, then that text appears in the color associated with the tag.

The Notification icon appears in different colors to indicate the most important unread message. For example, if 3 unread messages exist, and if one message has a normal level of importance, one message has a high level of importance, and one message has an urgent level of importance, then the Notification icon appears in the color for the urgent message. If no unread messages exist, then the Notification icon appears in a gray color.

Your Siebel administrator can configure different colors by changing the style sheet for the Siebel application.

About the Saved Queries Drop-Down List

You can select saved queries from the drop-down list for the Saved Queries field in the top right corner of the application window. In this list, you can access your saved

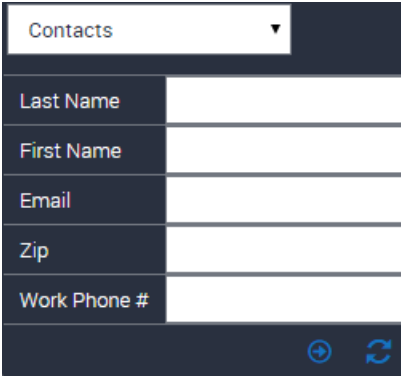
queries and the predefined queries established by your organization. [Figure 3–10](#) shows an example of the drop-down list for the Saved Queries field in the Menu Toolbar. For more information about saved queries, see [Chapter 7, "Locating Information Using Query and iHelp."](#)

About the Query Control

You can access the query control by clicking the magnifying glass icon on the menu toolbar. For more information about the magnifying glass icon and the menu toolbar see ["About the Menu Toolbar"](#) on page 3-16.

Within the query control, you access the Find drop-down list, which helps you narrow the your query criteria. [Figure 3–13](#) shows an example of the query control, with Contacts selected in the Find drop-down menu.

Figure 3–13 Example of a Query Control



The image shows a query control interface. At the top, there is a dark blue header bar with a white dropdown menu containing the text "Contacts" and a small downward-pointing triangle. Below this header is a table with five rows, each representing a search criterion. The first column of the table contains the labels "Last Name", "First Name", "Email", "Zip", and "Work Phone #". The second column contains five empty white input fields. At the bottom of the table, there are two blue circular icons: a plus sign and a refresh symbol.

Contacts	
Last Name	
First Name	
Email	
Zip	
Work Phone #	

About Records, Fields, and Field Controls

This chapter describes records, fields, and field controls in the Siebel application. It includes the following topics:

- [About Records](#)
- [About Fields](#)
- [About Text Fields](#)
- [About Field Controls](#)
- [About Check Boxes](#)
- [About Option Buttons](#)
- [About Drop-Down Lists](#)
- [About Field Control Buttons](#)
- [About the Currency Calculator](#)
- [About the Calendar Control](#)

About Records

A record is a group of related data organized into fields. For example, information about a contact, such as the last name, first name, address, and phone number, makes up a contact record. A record can appear in a list of related records, such as a list of contact records, or it can appear individually in a form. [Figure 4–1](#) shows an example of a record in a list.

Figure 4–1 Example of a Record in a List

<input type="checkbox"/>	Opportunity Name	Account	Revenue	Committed	Probability %	Team Space	Sales Cycle	Sales Method
<input type="checkbox"/>	optty	Kimball Dry Cle...	\$904.00		0%	<input type="checkbox"/>		ACAPS Applica... SADMIN
<input type="checkbox"/>	Sales Opp1	3Com	\$500,000.00		0%	<input type="checkbox"/>	01 - Prospecting	Oracle Sales St... SADMIN
<input type="checkbox"/>	Sales Opp2	3Com	\$200,000.00		0%	<input type="checkbox"/>	02 - Qualification	Oracle Sales St... SADMIN
<input checked="" type="checkbox"/>	Sales Opp3	3Com	\$300,000.00 <input type="text" value=""/>		0%	<input type="checkbox"/>	03 - Opportunity	Oracle Sales St... SADMIN
<input type="checkbox"/>	Sales Opp4	3Com	\$500,000.00		0%	<input type="checkbox"/>	04 - Quote Deli...	Oracle Sales St... SADMIN
<input type="checkbox"/>	Sales Opp5	3Com	\$80,000.00		0%	<input type="checkbox"/>	05 - Negotiations	Oracle Sales St... SADMIN
<input type="checkbox"/>	Sales opp6	3Com	\$250,000.00		0%	<input type="checkbox"/>	06 - Closed/Won	Oracle Sales St... SADMIN
<input type="checkbox"/>	Sales Opp7	3Com	\$100,000.00		0%	<input type="checkbox"/>	07 - Closed/Won	Oracle Sales St... SADMIN

In some situations, you cannot see every field associated with a record. To view additional fields in a record, you can drill down on a field in the record in a list. You can also show more columns for a record and then use the horizontal scroll bar, if necessary, to see the rest of the fields.

Related Topics

- ["About Horizontal Scrolling in Lists"](#) on page 3-14
- ["Using Field Hyperlinks in Records"](#) on page 6-9
- ["Organizing List Columns"](#) on page 6-16

About Fields

A field is a location in a record in which a particular type of data is stored. For example, a contact record might contain the following fields: last name, first name, address, and phone number. A field is characterized by its maximum length and the type of data (for example, numeric or alphabetic) it can contain.

Required Fields

In the Siebel application, required fields have a star icon next to the field name. You cannot save a record until you enter data in the required fields.

Read-Only Fields

If a field has a gray background, then the field is read-only, and you cannot change the field content.

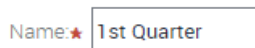
Maximum Number of Characters

Many fields can hold only a specific number of characters. For alphabetic and alphanumeric fields, the allowed number of characters varies in the Siebel application. Numeric fields can hold up to a maximum of 22 characters.

About Text Fields

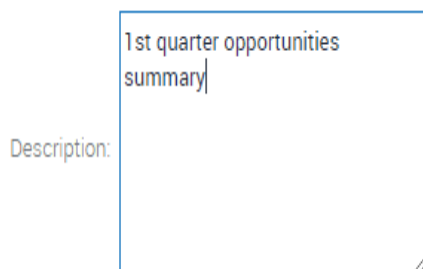
You can type text directly into a text field. You click in the field before typing this text. [Figure 4-2](#) shows an example of a text field in a form.

Figure 4-2 Example of a Text Field in a Form



Name★ 1st Quarter

To more easily enter text in text fields that can contain a large amount of text, you can click a drag the resizing indicator in the bottom right corner of the field to make the field larger. (You can also use the resizing indicator to make the field smaller.) In some browsers, you must click in the text field to see the resizing indicator. [Figure 4-3](#) shows an example of the resizing indicator for a text field.

Figure 4-3 Example of the Resizing Indicator for a Text Field

Developers can customize the Siebel application to save or to not save the size of a field that you resize. They can also customize the Siebel application to not use this resize feature for fields.

About Field Controls

You can enter data into the Siebel application by typing directly into fields or by using field controls. A field control can be a check box, a drop-down list, a button, and so on.

Field controls allow you to do such things as choose from a list of predefined values, enter values in a multi-value field, specify dates, and calculate values.

A field control can appear within a form or as part of a record in a list. In a list, the field control appears when you click in a field that includes it. To use a field control to edit a record in a list, click the control to activate it. In a form, you can see the field controls if they are available.

Related Topics

- ["About Check Boxes"](#) on page 4-3
- ["About Option Buttons"](#) on page 4-4
- ["About Drop-Down Lists"](#) on page 4-4
- ["About Field Control Buttons"](#) on page 4-4
- ["About the Currency Calculator"](#) on page 4-5
- ["About the Calendar Control"](#) on page 4-6

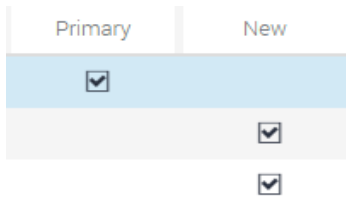
About Check Boxes

Click the box next to (or below) an option to select or clear the check box. When you click an empty box, a check mark or an X appears in the box. If you click a box that is selected, then the check mark or X disappears. [Figure 4-4](#) shows an example of check boxes.

In query mode, check boxes have a third possible state. For more information about using check boxes in query mode, see ["Tips for Queries"](#) on page 7-10.

You can press the space bar to select and deselect check boxes.

Figure 4–4 Example of Check Boxes



About Option Buttons

Option buttons, also called radio buttons, allow you to choose one of several options in a set. An option button appears as a circle, with a smaller, filled circle inside it when you select the option. You cannot select more than one option button in a set. [Figure 4–5](#) shows an example of option buttons.

You can press the up or down arrows and the space bar to select the option.

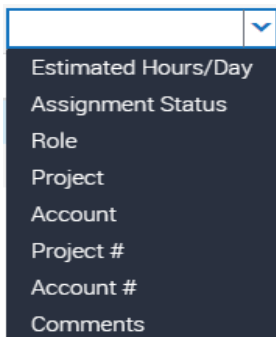
Figure 4–5 Example of Option Buttons



About Drop-Down Lists

A drop-down list allows you to click a down arrow to the right of a field to select from a list of available values. [Figure 4–6](#) shows an example of a drop-down list. You can type the field value in a field for drop-down list. You can also type part of the text string for a field value to automatically decrease the number of available values that appears in the drop-down list for the field, and then you can select the appropriate value for the field.





Figure 4–6 Example of a Drop-Down List



About Field Control Buttons

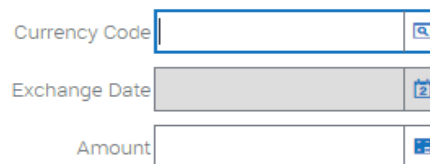
The field control buttons appear in many fields. [Table 4–1](#) describes these buttons. You use field controls to work with records in the Siebel application.

Table 4–1 Description of Field Control Buttons

Button	Name	Description	Related Topic
	Calculator button	Launches a currency calculator or a calculator for entering amounts.	" About the Currency Calculator " on page 4-5
	Calendar select button	Launches a calendar control for entering a date and optionally, time, in a date or date and time field. You can also type a date (or date and time) directly into a field.	" About the Calendar Control " on page 4-6
	Single select button	Launches a single selection dialog box.	" Associating Records Using a Single Selection Dialog Box " on page 5-2
	Multiple select button	Launches a multiple selection dialog box.	" Associating Records Using a Multiple Selection Dialog Box " on page 5-3

About the Currency Calculator

You access the currency calculator by clicking the calculator button that appears in a field for an amount and a currency. [Figure 4–7](#) shows an example of the currency calculator. You use the currency calculator to specify financial transaction information in foreign currencies.

Figure 4–7 Example of the Currency Calculator


The screenshot shows three input fields stacked vertically. The top field is labeled 'Currency Code' and has a small square button with a magnifying glass icon to its right. The middle field is labeled 'Exchange Date' and has a small square button with a calendar icon to its right. The bottom field is labeled 'Amount' and has a small square button with a calculator icon to its right.

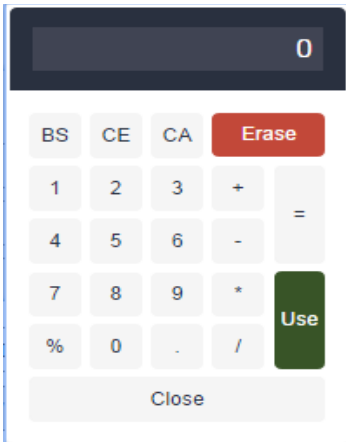
[Table 4–2](#) describes each field control in the currency calculator.

Table 4–2 Description of Currency Calculator Fields

Field	Field Control	Description
Currency Code	Single select button	Launches a dialog box where you can select the country and currency code.
Exchange Date	Calendar select button	Launches the calendar control where you can select the exchange date. The field does not appear in all currency calculators. For more information about the calendar control, see " About the Calendar Control " on page 4-6.
Amount	Calculator button	Launches the calculator where you can enter the amount. You can also type the amount directly into the field.

You access the calculator by clicking the calculator button that appears in a field for an amount. [Figure 4–8](#) shows an example of the calculator.

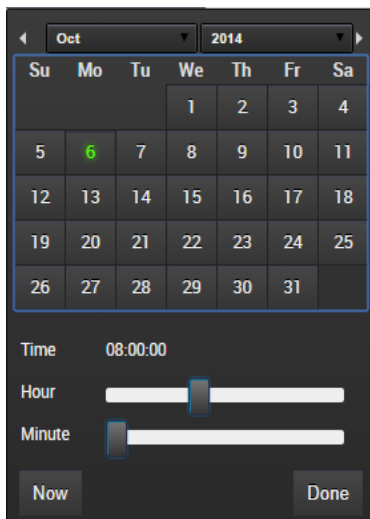
Figure 4–8 Example of the Calculator



About the Calendar Control

You use the calendar control to select date and time information for a field. [Figure 4–9](#) shows an example of the calendar control. You access the calendar control by clicking the calendar select button in a date field or a date and time field.

Figure 4–9 Example of the Calendar Control



Note: The current date is not assumed as the default when using the calendar control. An explicit click is required to make a date selection.

[Table 4–3](#) describes each element of the calendar control.

Table 4–3 Description of Calendar Control Elements

Element	Description
Month and Year	Shows the month and year. Use the left and right arrows to navigate to the previous and next month. Use the drop-down arrow next to the month to select a different month, and use the drop-down arrow next to the year to select a different year.
Calendar	Shows the calendar for the month. Use the calendar to select a date by clicking the date in the calendar.
Time field	Shows the time. This field appears only if you access the calendar control for a field that requires a time.
Hour slide bar	Sets the hour in the Time field. This field appears only if you access the calendar control for a field that requires a time.
Minute slide bar	Sets the minute in the Time field. This field appears only if you access the calendar control for a field that requires a time.
Now button	Sets the value for a date field to the current date and the value for a date and time field to the current date and time.
Done button	Saves your selections. If you do not want to save your selections, then click outside of the control to cancel your selections.

You cannot enter an incorrect value for a date. For example, if you enter a date of 221/45/1902, then your entry is not populated in the field. When you enter only two digits to represent a year, an assumption is made about whether the digits are preceded by 19 or 20 (19xx or 20xx). If the two digits are greater than or equal to 50, then the year of 19xx is assumed. If the two digits are less than 50, then the year of 20xx is assumed.

Note: You can set Strict Date Format in System Preferences. This preference enforces a deployment-wide standard date format and overrides all display formats defined in Siebel Tools. It applies only to date information. For example, if a control is set to MM/DD/YY hh:mm in Siebel Tools when the strict date format is set to DD/MM/YYYY, then the date portion of that control is replaced by the strict date format, and the resulting format is DD/MM/YYYY hh:mm.

Using Selection Dialog Boxes



This chapter describes how to use selection dialog boxes in the Siebel application. It includes the following topics:

- [Launching Selection Dialog Boxes](#)
- [Associating Records Using a Single Selection Dialog Box](#)
- [Associating Records Using a Multiple Selection Dialog Box](#)
- [Querying for Records in a Selection Dialog Box](#)
- [Finding Records in a Selection Dialog Box](#)

Launching Selection Dialog Boxes

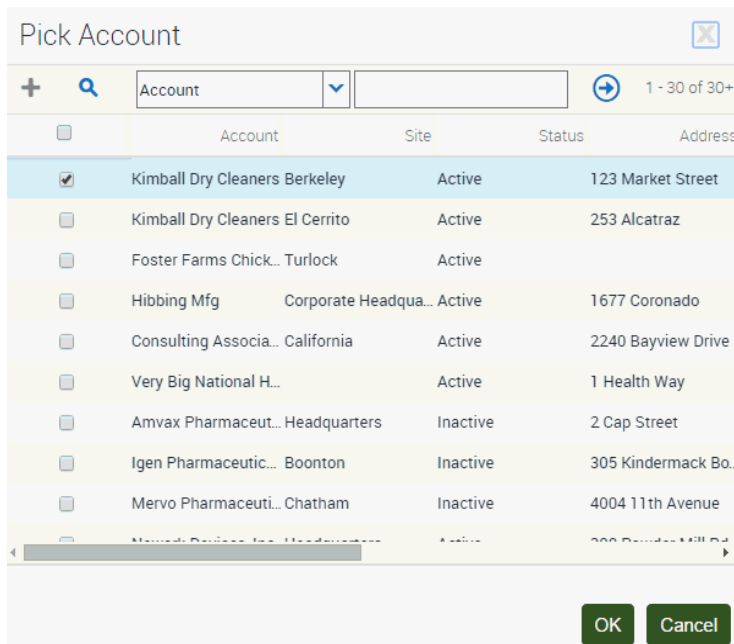
Buttons launch selection dialog boxes. [Table 5–1](#) describes these buttons.

Table 5–1 *Description of Select Buttons*

Button	Name	Description
	Single select button	Launches a single selection dialog box. This dialog box applies to pick applets.
	Multiple select button	Launches a multiple selection dialog box. This dialog box applies to Multi-Value Group (MVG) applets.

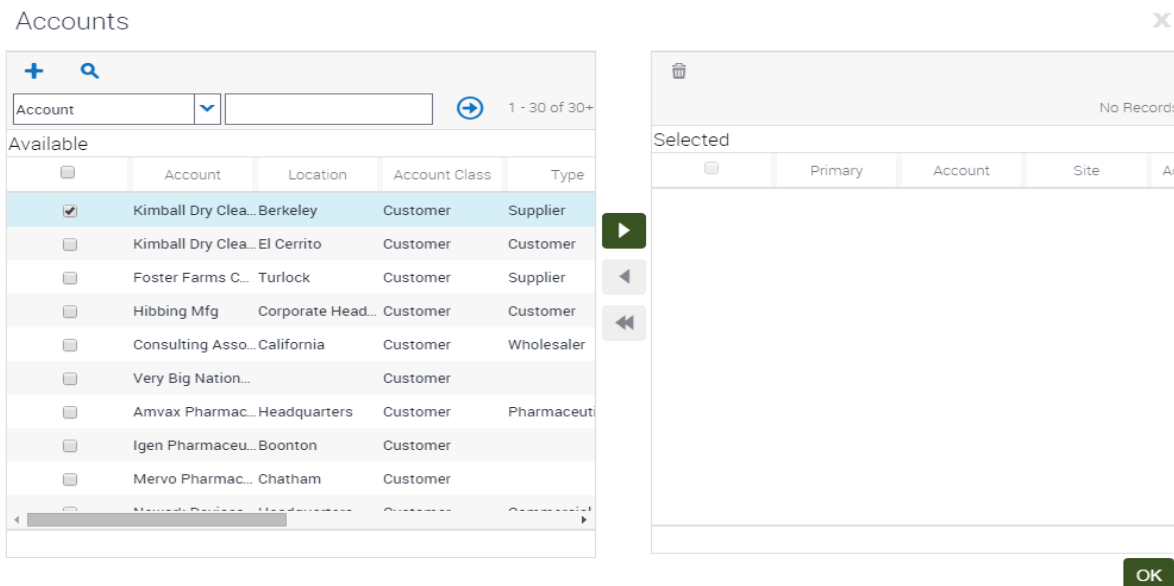
Single selection dialog boxes allow you to add only one record to a field. In some cases, you can create a new record from the single selection dialog box. [Figure 5–1](#) shows an example of a single selection dialog box.

Figure 5–1 Example of a Single Selection Dialog Box



Multiple selection dialog boxes allow you to select multiple records and add them to a field. In some cases, you can create a new record from the multiple selection dialog box. Figure 5–2 shows an example of a multiple selection dialog box.

Figure 5–2 Example of a Multiple Selection Dialog Box



Associating Records Using a Single Selection Dialog Box

On different screens in the Siebel application, you can associate a record with an existing record in a single selection dialog box and with a new record in a single selection dialog box.

Associating Records with Existing Records in a Single Selection Dialog Box

Complete the procedure in this topic to associate a record with an existing record in a single selection dialog box.

To associate a record with an existing record in a single selection dialog box

1. Navigate to the appropriate screen.
2. Select the record you want to associate with another record.
3. Click the single select button in the appropriate field.
A single selection dialog box appears.
4. In the dialog box, locate and select the record you want to associate with the existing record.
5. Click OK.

Associating Records with New Records in a Single Selection Dialog Box

Complete the procedure in this topic to associate a record with a new record in a single selection dialog box.

Note: In some situations, you cannot add new records in single selection dialog boxes.

To associate a record with a new record in a single selection dialog box

1. Navigate to the appropriate screen.
2. Select the record you want to associate with a new record.
3. Click the single select button in the appropriate field.
A single selection dialog box appears.
4. Click New.
The form for the new record appears.
5. In the form, enter the information for the new record, and click Save.
The new record appears in the single selection dialog box.
6. Click OK.

Associating Records Using a Multiple Selection Dialog Box

Multiple selection dialog boxes allow you to associate multiple records with one record. On different screens in the Siebel application, you can associate a record with an existing record in a multiple selection dialog box and with a new record in a multiple selection dialog box.

Associating Records with Existing Records in a Multiple Selection Dialog Box

Complete the procedure in this topic to associate a record with an existing record in a multiple selection dialog box.

To associate a record with an existing record in a multiple selection dialog box

1. Navigate to the appropriate screen.

2. Select the record you want to associate with other records.
3. Click the multiple select button in the appropriate field.
A multiple selection dialog box appears showing the list of selected records for the field.
4. Click Show Available to see the list of available records for the field.
5. Select the record you want to associate with the current record, and click Add.

Note: You can select multiple records by holding down the CTRL key and clicking each record.

The list of selected records for the field appears, and this list includes the record you select.

1. (Optional) If you want to remove records in the list of selected records, then do the following:
 - a. To remove one or more records, select the records, and click Remove.
 - b. To remove all records, click Remove All.
2. Click OK.

Associating Records with New Records in a Multiple Selection Dialog Box

Complete the procedure in this topic to associate a record with a new record in a multiple selection dialog box.

Note: In some situations, you cannot add new records in multiple selection dialog boxes.

If you attempt to add data to the database from a dialog box and then decide to cancel the record, then the data you add in the dialog box is *not* deleted from the database. However, if the data exists in the Siebel application only in the record for which you open the dialog box, then the data is deleted.

To associate a record with a new record in a multiple selection dialog box

1. Navigate to the appropriate screen.
2. Select the record you want to associate with a new record.
3. Click the multiple select button in the appropriate field.
A multiple selection dialog box appears showing the list of selected records for the field.
4. Click Show Available to see the list of available records for the field.
5. Click New.
The form for the new record appears.
6. In the form, enter the information for the new record, and click Save.
The list of selected records for the field appears, and the new record appears in this list.
7. Click OK.

Querying for Records in a Selection Dialog Box

You can query in a selection dialog box just as you query in a list or form. Consequently, you can search for specific information from one field or from several fields at one time.

To query for records in a selection dialog box

1. In the selection dialog box, click Query.

A blank row appears in the selection dialog box.

2. Enter your query criteria in the appropriate fields.

For more information about entering query criteria, see "[Simple Query Operators](#)" on page 7-7.

A wildcard is automatically assumed at the end of text you enter in the query fields. If you search for *Siebe*, then all words beginning with the letters *Siebe* are found.

3. Click Go.

The records matching your query criteria appear.

Finding Records in a Selection Dialog Box

A selection dialog box can contain many records. You might find it necessary to search for the records you want to see in the list. You can perform full- or partial-text searches on one field.

Finding records is similar to querying for records, but you do not save search results when you find records.

Note: Unlike performing a query, any spaces you enter in the Starting with field when finding records are included in the search. For example, if you are looking for a contact with the last name Smith, and enter Smith followed by a space in the Starting with field, then any contacts with the last name Smith are not found because the Siebel application looks for each character (all the letters in Smith *and* a space).

To find records in a selection dialog box

1. In the selection dialog box, select the field you want to search from the drop-down list for the Find field.

In a multiple selection dialog box, the Find field appears in the list of available records, and not in the list of selected records. Click Show Available to see the list of available records.

2. Type the text you want to search for in the Starting with field.

A wildcard is automatically assumed at the end of text you enter in the Starting with field. If you search for *Siebe*, then all words beginning with the letters *Siebe* are found.

3. Click Go.

The records matching your criteria appear.

Completing Common Record Tasks

This chapter describes how to perform common record tasks in the Siebel application. It includes the following topics:

- [Creating Records](#)
- [Using Quick Fill to Create Records](#)
- [Copying Records](#)
- [Editing Records](#)
- [Changing Multiple Records](#)
- [Saving Records](#)
- [Canceling Changes to Records](#)
- [Deleting Records](#)
- [Associating Records with Other Records](#)
- [Printing Records](#)
- [Using Field Hyperlinks in Records](#)
- [Displaying Record Count](#)
- [Finding Information About Records](#)
- [Identifying New Records](#)
- [Flagging Records](#)
- [Adding Notes to Records](#)
- [Merging Duplicate Records](#)
- [Spell Checking Fields in Records](#)
- [Attaching Files to Records](#)
- [Attaching URLs to Records](#)
- [Organizing List Columns](#)
- [Sorting List Columns](#)
- [Locking List Columns](#)
- [Resizing List Columns](#)

Creating Records

You can create records in the Siebel application using several methods, such as clicking a button or choosing an option from a menu. When you create a record, a new record appears, containing fields to complete.

The procedures in this topic show how to create records using some of the commands in the Siebel application. You can use the method that you prefer, or the method that is available.

Some records contain read-only fields. Read-only fields are fields in which you cannot enter data. You might not have user privileges that allow you to enter data in the read-only field, or the data in the field might be automatically populated by the Siebel application.

Note: Not all users can create new records. Your ability to create new records depends on the responsibilities your Siebel administrator gives to you.

Creating Records Using the New Button

You can create a record using the New button.

To create a record using the New button

1. In the list or form, click New.
A new record appears.
2. Enter the appropriate data, and save the record.

Creating Records Using the Menu Button

You can create a record using the menu button.

To create a record using the menu button

1. In the list or form, click the menu button, and then click New Record.
A new record appears.
2. Enter the appropriate data, and save the record.

Creating Records Using the Application-Level Menu

You can create a record using the application-level menu.

To create a record using the application-level menu

1. In the list or form, from the application-level menu, choose Edit, then New Record.
A new record appears.
2. Enter the appropriate data, and save the record.

Related Topics

- ["Associating Records Using a Single Selection Dialog Box"](#) on page 5-2
- ["Associating Records Using a Multiple Selection Dialog Box"](#) on page 5-3
- ["Copying Records"](#) on page 6-4

Using Quick Fill to Create Records

You can store default values for fields in templates, and then use these templates when you create new records. These templates, called quick fill templates, populate fields in a form. Your Siebel administrator can set up these templates for your organization, and you can create your own templates.

For example, if you are a service representative, then you can create quick fill templates containing the default field values for common types of service requests that you create. Then, when you receive a call for a new request for one of these types, you can apply the appropriate template to create a new service request with default field values.

Although users can save values for read/write fields, single-value and multi-value fields that are read-only are not supported. For example, if you create a quick fill template for a contact, and enter a value in the Account Name field, then that value is not saved in the template.

After you create a set of templates, you might want to delete the templates you no longer use or to rename some of the templates. You can perform these tasks in your user preferences. For more information, see "[Maintaining Quick Fill Templates](#)" on page 13-15.

Creating Quick Fill Templates

You can create a new quick fill template.

To create a quick fill template

1. In a form, create a new record.
You will not save this new record.
2. Complete all the record fields for which you want to define default values.
3. In the form, click the menu button, and then click Save as Template.

If an error message appears about entering a value for a required field, then click OK to dismiss the message.

The Save Template As dialog box appears.

4. Use the Template Name and Template Description fields to name and describe the quick fill template.
5. Click Save.

If a template with the same name already exists, then a message appears indicating that you cannot save the template. You must do the following:

1. Click OK on the Siebel message dialog box.
 2. To overwrite the existing template, click Overwrite.
 3. To save the template with a different name, type a new name in the Template Name field, and click Save.
6. Delete the new record.

Applying Quick Fill Templates to New Records

You can apply a quick fill template to a new record.

To apply a quick fill template to a new record

1. In a form, create a new record.
2. In the form, click the menu button, and then click Apply Template.
If an error message appears about entering a value for a required field, then click OK to dismiss the message.
The Pick Template dialog box appears.
3. In the Template list, select the template you want to use, and click OK.
The values defined in the quick fill template are populated in the record.

Using Quick Fill Templates to Create Records

You can use a quick fill template to create a record.

To use a quick fill template to create a record

1. In a form, click the menu button, and then click New From Template.
The Pick Template dialog box appears.
2. In the Template list, select the template you want to use, and click OK.
A new record appears. The values defined in the quick fill template are populated in the record.

Creating Records by Using the Last Quick Fill Template

You can create a record by using the last quick fill template that you used.

To create a record by using the last used quick fill template

- In a form, click the menu button, and then click New From Last Template.
A new record appears. The values defined in the quick fill template that you last used are populated in the record.

Copying Records

If a significant amount of data in a new record you want to add is similar to the data in an existing record, then you can copy the existing record, and then modify the copy to create the new record.

To copy a record

1. Find and select the record you want to copy.
2. Click the menu button, and then click Copy Record.
A new record with copied data appears.
3. Change the fields in the new record as needed, and step off the record to save your changes.

Editing Records

To edit a record, you must have appropriate access privileges.

To edit a record

1. Find and select the record you want to change.
2. Change the fields in the record, and step off the record to save your changes.

Changing Multiple Records

You might want to modify the same data in multiple records. Instead of repeatedly changing the same information in each record, you can change the same information in several records at once using the Change Records dialog box. You can change up to four fields at one time. [Figure 6-1](#) shows an example of the Change Records dialog box.

Figure 6-1 Example of the Change Records Dialog Box

To change multiple records

1. Navigate to the screen.
2. Select the records you want to change by holding down the CTRL key and clicking each record.
3. From the application-level menu, choose Edit, then Change Records.

The Change Records dialog box appears.

In the drop-down lists for the fields in this dialog box, columns on the list applet appear, except for those columns that are marked Inactive or Read Only. List columns do not appear if they are based on a join field and pick applets are not associated with them.

Note: Be careful when updating the value for a Multi-Value Group (MVG) field. When you update the value for such a field, you not only update the field value for the records you select in step 2, but in all records in the Siebel application that contain the same field value.

4. From the Field drop-down list, select the field in which you want to change data.
5. Enter the new data in the corresponding Value field.
Repeat steps 4 and 5 until you enter all of the information you want to change in your selected records.
6. Click OK to apply the changes.

Saving Records

You can save records in several ways.

Note: If you try to edit a record at the same time as another user, then a warning message appears, and you are unable to change the record until the other user exits the record.

To save a record

- Do one of the following:
 - When you finish editing or adding a record in a form or a list, step off the record to commit the changes to the database.
Stepping off the record means leaving it in any way, such as by moving to another record or by using the record navigation buttons.
 - Click the menu button, and then click Save Record.
 - From the application-level menu, choose Edit, then Save Record.

Note: When you finish editing or adding a record, you can click Enter to commit the changes to the database. However, this action is not a recommended way to save data.

Canceling Changes to Records

You might find that you want to cancel your changes to a record before you save the record. You can undo your changes to a record only if you have not yet saved the record.

Note: You cannot undo your changes or additions in selection dialog boxes. For example, when you add or remove employees from a selection dialog box, you cannot undo those changes.

To cancel changes to a record in form or a list

- Click the menu button, and then click Undo Record.

Note: Alternatively, press the Esc key to cancel changes to a record. The Esc key is only supported for a single undo operation. Pressing the Esc key multiple times may result in unexpected behavior depending on the user interface element or the control used.

Deleting Records

You can delete a record by using the Delete button, the menu button in a list or form, and the application-level menu.

Employee records are end-dated but not deleted to preserve historical information. For example, if an employee creates 100 records and later leaves the organization, then those records are not deleted in the Siebel application.

Note: When a parent record is deleted, explicitly or by using a merge, the primary ID fields are not immediately updated. For performance reasons, the primary ID fields are updated only when the parent record is required, and a refresh of the screen is performed.

Deleting Records Using the Delete Button

You can delete a record using the Delete button.

To delete a record using the Delete button

1. Select the record you want to delete.
In a list, the selected record is highlighted.
2. Click Delete.
A dialog box appears, asking you to confirm the deletion.
3. Click OK to delete the record.

Deleting Records Using the Menu Button

You can delete a record using the menu button.

To delete a record using the menu button

1. Select the record you want to delete.
In a list, the selected record is highlighted.
2. Click the menu button, and then click Delete Record.
A dialog box appears, asking you to confirm the deletion.
3. Click OK to delete the record.

Deleting Records Using the Application-Level Menu

You can delete a record using the application-level menu.

To delete a record using the application-level menu

1. Select the record you want to delete.
In a list, the selected record is highlighted.
2. From the application-level menu, choose Edit, then Delete Record.
A dialog box appears, asking you to confirm the deletion.
3. Click OK to delete the record.

Associating Records with Other Records

When you work with records, you need access to all information that is related to those records. You can associate a record with another record. For example, when you work with an account, you can track contacts for that account. The Contacts screen allows you to add and manage contacts. Also, many screens, such as in the Accounts screen, include a Contacts view. In the Contacts view, you can associate a contact with an account record.

Note: You cannot associate records with other records in screens if there is no association between the records in those screens.

To associate a record with another record

1. Navigate to the appropriate screen.
2. Drill down on a field in the record with which you want to associate another record.
3. Click the appropriate view tab.
The selected view appears.
4. In the selected view, click New.
A new record or a selection dialog box appears.
5. Do one of the following:
 - Complete the fields of the new record to add a new record.
 - From the selection dialog box, select a record, and click OK to add a new record.

Related Topics

- ["Creating Records"](#) on page 6-2
- ["Associating Records Using a Single Selection Dialog Box"](#) on page 5-2
- ["Associating Records Using a Multiple Selection Dialog Box"](#) on page 5-3

Printing Records

You can print records in the Siebel application in the following ways:

- **Running a report.** You can print records by running and then printing a report. For more information about reports, see ["Running Reports"](#) on page 10-1.
- **Browser print.** You can use the print feature for the browser to print an image of the current screen. If you want to print a screen that contains colors, then you can use the color printing feature for your browser. Color printing is important for screens in which colors signify meaning, such as calendar screens and notification screens.

Note: The printed output might not be an exact replica of what you see on your screen. The print options for your browser determine the printed output.

- **Quick Print button.** You can use the quick print functionality that works through the print feature for the browser. Browser print (HTML) allows you to print both lists and forms.

Printing Records by Using Quick Print

You can print records by using quick print.

To print records by using quick print

1. Navigate to the list that contains the records you want to print.

2. Click the Quick Print button on the application toolbar.
The print settings in your user preferences determine quick print options. For more information about setting up quick print options in your user preferences, see "[Setting Quick Print Options](#)" on page 13-5.
3. Use the print feature in the browser to send the output to your printer.

Using Field Hyperlinks in Records

Field hyperlinks can appear in a record that is in a list. They usually consist of blue text that is underlined when you place your cursor over the hyperlink. A field hyperlink provides one-click access to detailed or additional information for the underlined text. For example, when an account name appears as a field in a list, it appears as a hyperlink. This hyperlink allows you to navigate directly to additional information about that account name.

Clicking a field hyperlink that accesses information that is associated with a selected record and that is within the current screen is called *drilling down*. Clicking a field hyperlink that accesses information that is associated with a selected record but that is outside the current screen is called *drilling across*.

When you drill across screens by using field hyperlinks, you remain in the same thread. Consequently, you might navigate to a new screen and view, but you do not see all of the records available in that screen and view. If you want to see every record in the new screen, then you must click the current screen tab.

Displaying Record Count

You can see a count of the number of records in a list without navigating to the last record in that list. If you execute a query, then this function shows you the total number of records in the query results.

To display a record count

1. (Optional) Execute a query.
2. Click the menu button, and then click Record Count.

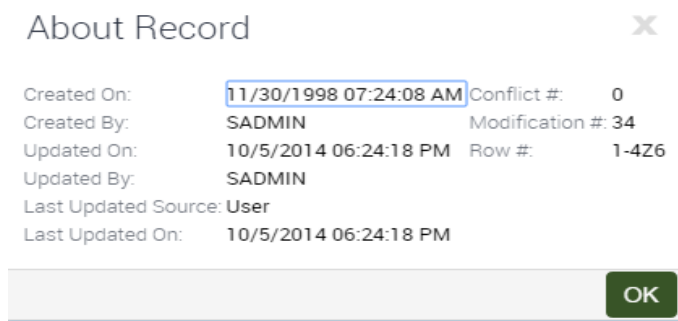
The Record Count dialog box appears.

- If you do not execute a query, then this dialog box shows the total number of records in the active list.
- If you execute a query, then this dialog box shows the total number of records that match your query criteria.

Finding Information About Records

You can view information about a record in the About Record dialog box.

[Figure 6–2](#) shows an example of the About Record dialog box.

Figure 6–2 Example of the About Record Dialog Box**To find information about a record**

1. Navigate to and select the record.
2. Click the menu button, and then click About Record.

The About Record dialog box appears.

Some fields in the dialog box are described in the following table.

Field	Description
Updated On	Displays the time of the last update for the record.
Last Updated Source	Displays the component for the record. This information is useful for debugging issues when multiple components might change the data.
Last Updated On	Displays the date and time when the data changed in the database and provides a consistent timestamp usage across all components for each record. For remote users, the Last Updated date (in the extracted database) might be different from the Last Updated On date (in the server database).
Conflict #	Displays the conflict number. Siebel Remote uses this number to prevent duplication of records. For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .
Modification #	Displays the modification number. This number increases each time a record is updated. It is used when two or more users try to update a record at the same time. For example, if user A and user B are both reading a record with modification number 3, and user A updates the record, then the modification number changes to 4. If user B then tries to update the record, then the modification number of user B's record (3) is not current, and user B's update is rejected. User B is not able to update the record until it is refreshed with user A's changes.

3. Click OK to close the dialog box.

About Accessing the About Record Dialog Box After a Merge

If you access the About Record dialog box after merging records, then it displays the last updated date for the remaining record. It does not show the merge date as the last updated date, nor does it show the last updated date for the record that is merged into the existing record.

Identifying New Records

If you are a member of a team that shares information, then you can see any new records that are added to that shared information. You can see a record only if you have access rights to view that record.

If a record is newly added to the Siebel application, then a star icon appears in the New field in that record. After you drill down on a field in a new record, the star icon no longer appears in the New field.

Note: The star icon in the New field is specific to the primary employee. If you are not the primary employee for a position, then this star icon still appears after you drill down. For more information about positions, see "[About Access and Responsibilities in the Siebel Application](#)" on page 2-3.

To identify a new record

- In a list, look for a star icon in the New field for the record.

Flagging Records

In certain screens, such as Projects, you can flag records that you want to single out. A flag acts as a reminder that only you can see.

To flag a record

1. Navigate to the record you want to flag.
2. In the Priority Flag field of the record, select the check box.

When you step off the record, a flag is placed in Priority Flag field.

The Priority Flag field is not available in all views. If you cannot see a Priority Flag field for the record, then check your Columns Displayed settings. For information about showing and hiding columns, see "[Organizing List Columns](#)" on page 6-16.

Adding Notes to Records

When you work with records, you might want to enter notes. You can add a note to a record in the Notes view.

In the Notes view, you can enter public notes or private notes. Use the link bar in the Notes view to navigate between public and private notes. Anyone who can access the record can see a public note for the record. Only the person who enters the note can see a private note.

The Notes view is not available in all screens. It appears only when it is beneficial to keep notes for individual records, for example, in the Accounts, Contacts, and Opportunities screens.

To add a note to a record

1. Find and drill down on a field in the record to which you want to add a note.
2. Click the Notes view tab, and on the link bar, click Private Notes or Public Notes.
3. Click New.

A new record appears.

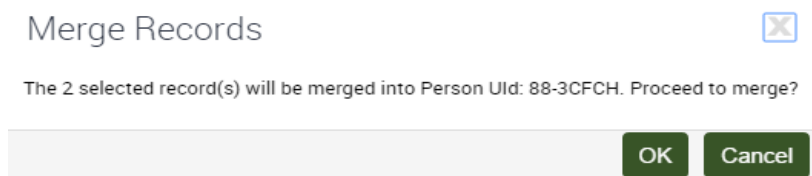
4. From the drop-down list for the Type field, choose Note.
5. In the Description field, enter the text for the note.
6. (Optional) Click Check Spelling to check the spelling in the text of your note.
For more information, see "[Spell Checking Fields in Records](#)" on page 6-13.

Merging Duplicate Records

You might find that two or more records contain the same information. To keep the database accurate, you can merge the records into one record. The Merge Records command allows you to merge multiple records into one record.

When you use the Merge Records command, the Merge Records dialog box appears. [Figure 6-3](#) shows an example of the Merge Records dialog box.

Figure 6-3 Example of the Merge Records Dialog Box



If other records are associated with the records you merge, then those records are associated with the surviving record. Any duplicate associated records are deleted.

You can merge only records for which you are the owner or for which you are the primary person. The merge functionality might not be available to you because of your access privileges and your configuration.

Note: When you merge two records, you must pick the surviving record and the source record. Field values for the source record do not exist after you merge records. Only field values in the surviving record remain after you merge records. For example, if you merge two contact records, and the source record contains a value in the Job Title field, but the surviving record does not, then the Job Title field in the surviving record has no value after the merge. The value in the Job Title field in the source record is overwritten by the value in the Job Title field in the surviving record, even when that value is NULL.

To merge two records

1. Click the record that is the source record.
2. Press and hold down the CTRL key, and click the record that is the surviving record.

After the merge is complete, the source record is merged *into* the surviving record.

3. From the application-level menu, choose Edit, then Merge Records.

Note: If the Merge Records command is unavailable, then the functionality is not supported for the record types you select.

The Merge Records dialog box appears, displaying a field value for the surviving record.

4. Review the information in the dialog box to make sure the correct record survives, and click OK to complete the merge.

The records are merged into a single record that has the name of the surviving record and that includes the data from the surviving record.

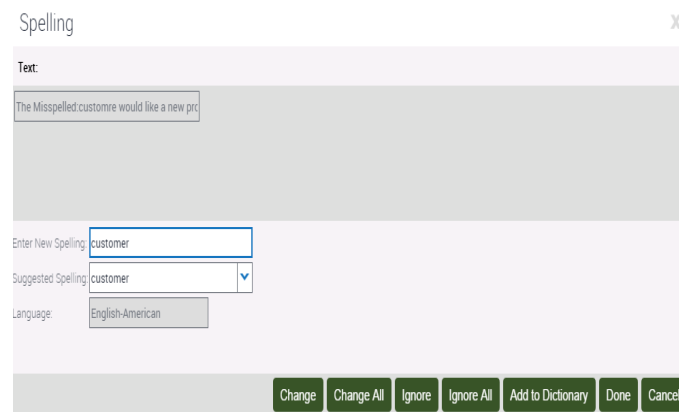
Spell Checking Fields in Records

You can perform a spell check from multiple places in the Siebel application. For example, in a Notes view, you can click the Check Spelling button to verify the proper spelling of text in the Description field. In Service Request forms, you can click the menu button and then click Check Spelling to verify the proper spelling of text in the Summary field. For spell check to work properly when you invoke it using the menu button, you must first step off the record to save the record before you run spell check.

You can set up your preferences so that all the email messages, faxes, pages, or outbound wireless messages you send from the Siebel application are automatically checked for spelling errors before they are sent to a recipient. For more information, see "[Changing Default Spell Check Options](#)" on page 13-8.

Figure 6-4 shows an example of the Spelling dialog box.

Figure 6-4 Example of the Spelling Dialog Box



Attaching Files to Records

When the Attachments view is available within a screen, you can attach a file to a record. You can attach files such as Microsoft Outlook email messages, Microsoft Word documents, and image files. The Attachments view allows others who work with the record to access the attachment so that they see the latest information.

The Attachments view is not available in all screens. It appears only when it is beneficial to keep supporting material for individual records, for example, in the Contacts, Accounts, and Opportunities screens.

If you edit files attached to Siebel records, then your changes are saved when you step off the attachment record in the Siebel application.

Attachments can be edited in Siebel Open UI only if Java is available on the client computer. If not, users must download the document to a secure location specified by the browser and upload the edited document thereafter. If Java is available on the

client computer, documents can be edited and saved in Siebel Open UI without an intermediate save location.

Attaching Files to Records Using the New File Button

You can create a file attachment by using the New File button in the Attachments view.

To attach a file to a record using the New File button

1. Drill down on a field in the record to which you want to add the file attachment.
2. Click the Attachments view tab.
The Attachments list appears.
3. Click New File.
A dialog box appears.
4. Locate and select the file you want to attach to the record, and then click Open.

Note: You can select multiple files by holding down the CTRL key and clicking each file.

The dialog box closes, and the file appears in the Attachments list as a new attachment record with the appropriate fields populated.

5. Complete additional fields as necessary.
Some fields are described in the following table.

Field	Description
Update File	Select this check box to indicate that you want the attachment copy of the file to be updated automatically each time the original file is updated.
Download File	Select this check box to indicate that the document is retrieved during the next synchronization session. This field allows you to request files from the server, and applies only if you use Siebel Remote.

Attaching Files to Records Using the Menu Button

You can create a file attachment using the menu button in the Attachments view.

To attach a file to a record using the menu button

1. Drill down on a field in the record to which you want to add the file attachment.
2. Click the Attachments view tab.
The Attachments list appears.
3. Click the menu button, and then click New Record.
A new record appears.
4. In the Attachment Name field, click the select button.
The Add Attachment dialog box appears.
5. Click Choose File.
A dialog box appears.
6. Locate and select the file you want to attach to the record, and then click Open.

Note: You can select multiple files by holding down the CTRL key and clicking each file.

The dialog box and the Add Attachment dialog box close, and the file appears in the Attachments list as a new attachment record with the appropriate fields populated.

Attaching Files to Records Using Drag-and-Drop

You can create an attachment by dragging a file into the Attachments list view.

To attach a file to a record using drag-and-drop

1. Drill down on a field in the record to which you want to add the attachment.
2. Click the Attachments view tab.
The Attachments list appears.
3. Locate the file you want to attach to the record.
4. Click the file to select it, and drag the file to the Attachments list.

The file appears in the Attachments list as a new attachment record with the appropriate fields populated.

Attaching URLs to Records

In addition to attaching files to records, you can also attach URLs to records to provide team members with the latest information.

Attaching URLs to Records Using the New URL Button

You can create a URL attachment by using the New URL button in the Attachments view.

To attach a URL to a record using the New URL button

1. Drill down on a field in the record to which you want to add the URL attachment.
2. Click the Attachments view tab.

The Attachments list appears.

3. Click New URL.

The Add URL dialog box appears.

4. Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click Add.

The Add URL dialog box closes, and the URL appears as a hyperlink in the Attachments list. You can click this hyperlink to access the corresponding Web site. If you cannot access the Web site after adding it as an attachment, then you might not be connected to the network.

Attaching URLs to Records Using the Menu Button

You can create a URL attachment using the menu button in the Attachments view.

To attach a URL to a record using the menu button

1. Drill down on a field in the record to which you want to add the URL attachment.

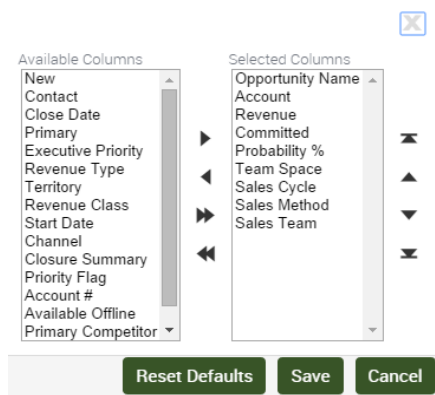
2. Click the Attachments view tab.
The Attachments list appears.
3. Click the menu button, and then click New Record.
A new record appears.
4. In the Attachment Name field, click the select button.
The Add Attachment dialog box appears.
5. Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click Add.
The Add Attachment dialog box closes, and the URL appears as a hyperlink in the Attachments list. You can click this hyperlink to access the corresponding Web site. If you cannot access the Web site after adding it as an attachment, then you might not be connected to the network.

Organizing List Columns

A list consists of columns of data. Some of these columns might not appear on the screen. You can add, remove, and rearrange the list columns as needed by using the Columns Displayed dialog box.





Figure 6-5 shows an example of the Columns Displayed dialog box.

Figure 6-5 Example of the Columns Displayed Dialog Box







To organize columns in a list

1. In a list, click the menu button, and then click Columns Displayed.
The Columns Displayed dialog box appears. For more information about the Columns Displayed dialog box, see [Figure 6-5](#).
2. Select one or more columns in one of the lists (Available Columns or Selected Columns).
3. Click the buttons between the Available Columns list and the Selected Columns list to show or hide the columns you select.
The buttons are described in the following table.

Button	Description
	Shows the columns you select. After you click Save, the columns appear in the list you are modifying.
	Hides the columns you select. After you click Save, the columns do not appear in the list you are modifying.
	Shows all columns in the list. After you click Save, the columns appear in the list you are modifying.
	Hides all columns in the list. After you click Save, the columns do not appear in the list you are modifying.

- Select a column in the Selected Columns list, and click the column-ordering buttons to the right of the Selected Columns list to change the order in which the columns appear in the list.

The buttons are described in the following table.

Button	Description
	Moves the column you select up one position in the Selected Columns list. After you click Save, the column is moved to the left in the list you are modifying.
	Moves the column you select down one position in the Selected Columns list. After you click Save, the column is moved to the right in the list you are modifying.
	Moves the column you select to the top of the Selected Columns list. After you click Save, the column is moved all the way to the left in the list you are modifying.
	Moves the column you select to the bottom of the Selected Columns list. After you click Save, the column is moved all the way to the right in the list you are modifying.

- Click Save.

Sorting List Columns

You can sort the records in a list by the values in one or more columns. For example, you can sort accounts to appear alphabetically by name (by sorting on the Name column). You can use an advanced sort to sort by up to three columns at once. For example, you might want to sort the accounts by name, then by current volume of sales, and then by city.

Note: If you use any special characters in a field, such as parentheses, then you might encounter problems when you try to sort records.

The active sort order of a column is designated in the column header. A dark arrow pointing up means the values in the column are sorted in ascending order. A dark arrow pointing down means the values in the column are sorted in descending order.

Figure 6–6 shows an example of a sort arrow in a column header.

Figure 6–6 Example of a Sort Arrow in a Column Header

Opportunity Name▲

Note: The sort order resets when you leave a screen, unless you save the sort order as part of a query. This option is available only for *My* views. For more information about querying, see [Chapter 7, "Locating Information Using Query and iHelp."](#)

Sorting a Single List Column

You can sort data a single column in ascending order and in descending order.

To sort a single column

1. In a list, click the column header of the column that you want to sort.
2. Click Sort.

The column is sorted in ascending or descending order.

3. Click the column header again.
4. Click Sort.

The column is sorted in the opposite order.

Performing an Advanced Sort in Lists

You use the Sort Order dialog box to perform an advanced sort.

[Figure 6–7](#) shows an example of the Sort Order dialog box.

Figure 6–7 Example of the Sort Order Dialog Box

Sort Order X

Sort By ▼ Ascending Descending

Then By ▼ Ascending Descending

Then By ▼ Ascending Descending

To perform an advanced sort in a list

1. In a list, click the menu button, and then click Advanced Sort.
The Sort Order dialog box appears. For more information about the Sort Order dialog box, see [Figure 6–7](#).
2. From the drop-down list for the Sort By field, select the first column to sort by.

3. From the drop-down list for the first Then By field, select the second column to sort by.
4. From the drop-down list for the second Then By field, select the third column to sort by.
5. Use the Ascending and Descending option buttons to define the sort order for each column you select for the advanced sort.
6. Click OK.

The columns are sorted in the order you specify.

Locking List Columns

Lists can contain many columns. You might find that you want to scroll to the right and view additional columns without losing focus of the left-most columns. You can lock the left-most columns.

Figure 6–8 shows an example of locked columns in a list. The locked column include the Account column, and all the columns to the left. The headers of the locked columns have a darker gray background.

Note: Locked columns cannot be edited or queried.

Figure 6–8 Example of a List View with Locked Columns

<input type="checkbox"/>	Last Name	First Name	Mr/Ms	Account	mail	Contact Method	New	Job Title	Cell Phone #	Household Status	Organization	Mid
<input type="checkbox"/>	Ramakrishna	Sowjanya									Default Organiz...	
<input type="checkbox"/>	A*	M*		Dawson Rice Ba...		Fax					Millennium Reta...	
<input type="checkbox"/>	ABRAHAM	MAYA									Default Organiz...	
<input type="checkbox"/>	ABS_ADMIN_EM	ABS_ADMIN_EM					*				Default Organiz...	
<input type="checkbox"/>	ABS_ADMIN_EM	ABS_ADMIN_EM		Benchmark Capi...			*				Default Organiz...	
<input type="checkbox"/>	ABS_ADMIN_EM	ABS_ADMIN_EM		Benchmark Capi...			*				Default Organiz...	
<input type="checkbox"/>	AGRAWAL	HIMANSHU									Default Organiz...	
<input type="checkbox"/>	AJWANI	VARUN									Default Organiz...	
<input type="checkbox"/>	ALEX	THOMAS					*				Default Organiz...	

To lock columns in a list

1. Navigate to the list in which you want to lock columns.
2. Click the header on the column you want to lock.
3. Click Lock.

The locked column headers appear with a darker gray background.

4. Scroll to the right to view columns without losing focus of the locked columns on the left.

You can unlock columns.

To unlock columns

- Click the header of the right-most locked column, then click Unlock.

Note: If you want to keep some, but not all of the columns locked, click the header of the right most column that you want to remain locked, then click the unlock icon. This will unlock the columns to the right of your selection.

Resizing List Columns

You might find that you want to change the width of a column so that you can see all of the data in the column. A changed column width is automatically saved, so you do not have to repeatedly resize the column.

To resize columns

1. Place the cursor over the right header divider for the column you want to resize.
A resize arrow appears.
2. Click and drag the column divider to the right to widen the column, or to the left to narrow the column.

Locating Information Using Query and iHelp

This chapter describes how to use queries and iHelp to locate information in the Siebel application. It includes the following topics:

- [About Queries](#)
- [Creating Queries for Records](#)
- [Finding Records in Lists](#)
- [Refining Queries](#)
- [Deleting Queries](#)
- [Canceling Long-Running Queries](#)
- [Using the Query Assistant](#)
- [About Using Default Queries](#)
- [About Querying a Telephone Number](#)
- [Simple Query Operators](#)
- [Compound Query Operators](#)
- [Tips for Queries](#)
- [About iHelp](#)
- [Using iHelp to Complete Tasks](#)
- [Using the iHelp Map](#)

About Queries

You use queries to locate one or more records that meet specified criteria. You can view the records that a query finds on-screen, export them to a file, or use them as input for a report. A query searches the database for specific data by using conditions or criteria. For example, you might want to find all open service requests with a high priority. You perform this query in the Service screen by using the query criteria of a Status field value of Open and a Priority field value of High.

After you create a query, you can save it, and run it again later.

Predefined Queries

Your organization can provide predefined queries (PDQs). Predefined queries have established criteria, and appear in the drop-down list for the Saved Queries field. You cannot change predefined queries.

For example, if you always work with accounts located in California, then the drop-down list for the Saved Queries field might contain a PDQ called CA Accounts that finds all the accounts in California. Each time you want to see only the California accounts, you do not have to create a new query. Instead, you can select the predefined CA Accounts query from the drop-down list for the Saved Queries field.

When you execute a predefined query, the query runs against *all* the data for the current screen. If you run a query to narrow the data set, then the predefined query uses *all* data for the screen, not just the data that appears in a list.

Case Insensitive and Accent Insensitive Queries

Query features provide indexes that directly support case insensitive and accent insensitive (CIAI) queries on eligible text columns. CIAI queries ignore both the case and use of accents to return all records that otherwise match the query criteria. This capability is important when searching for records such as contact or customer names. For example, an exact-match query produces different a query results than a CIAI query if the query results contain capitalization inconsistencies (such as MacArthur and Macarthur) or accent usage inconsistencies.

CIAI queries apply to the entire query string. To find out if your Siebel application uses exact-match queries or CIAI queries, run test queries and review the query results. For more information about CIAI queries, see *Siebel Global Deployment Guide*.

Your Siebel administrator can configure specific columns for CIAI queries by defining CIAI columns and CIAI indexes in the repository using the CIAI wizard in Siebel Tools. The CIAI wizard sets the Default Insensitivity property for CIAI columns to *DB Case & Accent*. CIAI-enabled fields are blank in the user interface. The fields that contain the Case Required property represent non CIAI-enabled fields.

A case-insensitive query works on all supported databases for the current release of the Siebel application. However, an accent-insensitivity works only on the databases that provide the accent-insensitivity feature, such as Microsoft Structured Query Language (SQL). For more information about supported databases, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

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 Certification tab on My Oracle Support. For information about the Certification application, see article 1492194.1 (Article ID) on My Oracle Support.

Creating Queries for Records

You can create your own queries, execute them, and save them for later use. Queries that you create are called user-defined queries. In these queries, you can enter your own criteria to locate a specific set of records.

To create a query for records

1. Navigate to the screen.
2. Do one of the following:
 - In the list or form, click Query.
 - In the list or form, click the menu button, and then click New Query.
 - From the application-level menu, choose Query, then New Query.

- Use the appropriate keyboard shortcut.

When you invoke the new query command, a blank form or a blank row in a list appears.

3. Enter the query criteria in the appropriate fields.

For more information about entering query criteria, see ["Simple Query Operators"](#) on page 7-7.

A wildcard is automatically assumed at the end of text you enter in the query fields. If you search for *Siebe*, then all words beginning with the letters *Siebe* are found.

4. Do one of the following:

- In the list or form, click Go.
- In the list or form, click the menu button, and then click Run Query.
- From the application-level menu, choose Query, then Run Query.
- Use the appropriate keyboard shortcut.

The query executes, and the records that match the query criteria appear.

5. If you want to save the query, then do the following:

1. From the application-level menu, choose Query, then Save Query As.

The Save Query As dialog box appears.

2. In the Query Name field, enter a name for the query, and click OK.

The saved query appears in the drop-down list for the Saved Queries field.

Finding Records in Lists

A list can contain many records. You might find it necessary to search for the records you want to see in the list. You can perform full- or partial-text searches on one field.

Finding records is similar to querying for records, but you do not save search results when you query for records.

To find records in a list

1. Navigate to the screen.
2. In the list header, select a field you want to search from the drop-down list for record fields.
3. In the list header, type the text you want to search for in the field for a search value.

A wildcard is automatically assumed at the end of text you enter in the value field. If you search for *Siebe*, then all words beginning with the letters *Siebe* are found.

4. Press ENTER.

The records that match the criteria appear.

Refining Queries

You can refine the criteria of a predefined query or a user-defined query.

Note: If you refine the criteria of a predefined query, then you must save the query with a different name to save the query.

To refine a saved query

1. Navigate to the screen.
2. From the drop-down list for the Saved Queries field, select the query.
The records meeting the query criteria appear.
3. Do one of the following:
 - In a list or form, click the menu button, and then click Refine Query.
 - From the application-level menu, choose Query, then Refine Query.
 - Use the appropriate keyboard shortcut.
4. Add and edit the criteria.
5. Do one of the following:
 - In the list or form, click the menu button, and then click Run Query.
 - From the application-level menu, choose Query, then Run Query.
 - Use the appropriate keyboard shortcut.The query executes, and the records that match the criteria appear.

Deleting Queries

You can delete user-defined queries.

To delete a saved query

1. Navigate to the screen.
2. From the application-level menu, choose Query, then Delete Saved Query.
The Delete Record dialog box appears, showing the user-defined queries for that screen.
3. Select the query you want to delete in the Query Name list.
4. Click OK to delete the query.

Canceling Long-Running Queries

Because of how your Siebel application is set up, you might be able to cancel queries that run for a long time. For more information about your setup, contact your Siebel administrator.

To cancel a long-running query

1. Execute a query.
If the query does not return records after a specified period of time, then a dialog box appears.
2. Click Cancel.
A confirmation dialog box appears to confirm that the query canceled successfully.

3. Click OK.

Using the Query Assistant

After clicking Query in a form or list, you can click Query Assistant to launch a dialog box to create a query. The Query Assistant button appears to the right of the Cancel button after you click Query. You can use the Query Assistant dialog box if you are not familiar with query operators. When you use the Query Assistant, you can select operators, instead of entering them, to find the information you are looking for. You can also save your query before you execute it by clicking Save Query.

Figure 7-1 show an example of the Query Assistant dialog box. This Query Assistant queries for all accounts for which the value in the Site field is San Francisco and the value in the Name field starts with Abbot. Querying in the Query Assistant is case-insensitive.

Note: You cannot use the EXISTS operator in the Query Assistant for Multi-Value Group (MVG) fields.

Figure 7-1 Example of the Query Assistant Dialog Box

To perform a query using the Query Assistant

1. Navigate to the screen.
2. In the list or form, click Query.
When you invoke the new query command, a blank form or a blank row in a list appears.
3. Click Query Assistant.
The Query Assistant dialog box appears.

Note: If no values appear in the drop-down lists in this dialog box, then contact your Siebel administrator.

4. In the Query Assistant dialog box, do the following:
 - a. From the field drop-down list in the first row of fields, select a field to query.
 - b. From the drop-down list to the right of the field you just selected, select an operator for that field.
 - c. In the field to the right of the operator you just selected, enter the value applicable to that operator.
 - d. Complete other rows as needed.
 - e. From the drop-down list for the Perform Query using field, select AND or OR to specify the type of operator you want to use between each row of your criteria.

AND shows only results that meet all the criteria. OR shows results that meet any of the criteria.
 - f. Click Go.

The query executes, the Query Assistant dialog box closes, and the records that match the criteria appear.

About Using Default Queries

When you navigate to a screen, the records that appear depend on the default query set up for that screen. You can specify a different default query in your user preferences. If no default query is set up, then the first predefined query in the drop-down list for the Saved Queries field executes. For more information, see "[Setting Up Default Queries](#)" on page 13-7.

Note: You cannot set up a blank query as the default. Also, you cannot set your user preferences so that no query executes when you navigate to a screen.

If you set up a default query for the view associated with a visibility filter, then the query executes only if you access that view using the Site Map link. Using the visibility filter to access that filter's default query fails. If the visibility filter is set up as the default view for that screen, then clicking the screen tab executes the default query for the filter.

About Querying a Telephone Number

When you perform a query for a telephone number, the country code of the default country in your computer's regional settings is automatically added as a prefix to the query value. (However, if the default country is the United States, then no prefix is added.) For example, if the default country is Germany, and if you type 0181 in the telephone field of a query, then the German country code (+49) is added to the query value, and the query value is +49*0181*.

To find a telephone number for a country other than the default country, you must specify the country code in the query value. To avoid limiting the query to one country, you must refine the query to remove the country code portion.

For example, a European user enters the phone numbers of business contacts throughout the continent. When traveling to another country, the user sets the default country on a laptop computer to that country. When in Germany, the user needs local phone numbers. Therefore, German numbers are returned by default for each query. If the user wants to find the number of a contact in England while in Germany, then the user must enter +44 before the query. When next traveling to England, the user does not use German contacts as much. Therefore, only English numbers are returned by default for each query.

Note: Including a hyphen in a telephone number query causes the query to fail. Do not include hyphens in telephone number queries.

Simple Query Operators

You can use several simple query operators to define query criteria.

Note: Query operators are reserved in Siebel query language. If you enter a query value that includes a query operator, then you must enclose the query value in double quotes. For example, a query for records containing the text *call is closed* fails. The word IS falls into the category of reserved Siebel query language because it is used in the query operators IS NULL, IS NOT NULL, and so on. If you enclose the text *call is closed* in double quotes ("*call is closed*"), then the Siebel application returns all records containing the text *call is closed*. Other reserved operators include apostrophe ('), brackets ([]), comma (,), parentheses (()), tilde (~), and comparison operators such as =, <, and >.

Table 7-1 shows simple query operators. In this table, operators appear in uppercase. However, query strings are case-sensitive. The operators do not have to be in uppercase.

You can use simple query operators on their own.

Table 7-1 Simple Query Operators

Operator	Description	Example
*	<p>Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters, including a space, that appear at the location of the asterisk.</p> <p>You cannot use an asterisk to find dates.</p> <p>To find words on more than one line in a field, you must use an asterisk to separate the words. You cannot query for control characters or non-printable characters, such as line feeds (LF) or carriage returns (CR).</p>	<p>*rang* finds <i>arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle,</i> and so on.</p> <p>If performance is poor when you use the asterisk, then substitute "IS NOT NULL" in the query field. This substitution often improves performance.</p>
?	<p>Wildcard operator. Placed anywhere in a string, returns records containing the characters in the string plus any one additional character that appears at the location of the question mark.</p>	<p>?rag finds <i>brag, crag, or drag.</i></p> <p>t?pe finds <i>type</i> and <i>tape</i>, but not <i>tripe</i>.</p>
""	<p>Placed before and after a string, returns records that exactly match the string, unless modified by a wildcard operator (* or ?). Quotes find a group of words in the exact order with the exact uppercase or lowercase lettering.</p>	<p>"Oracle Solaris" finds records that contain <i>Oracle Solaris</i> in the query field.</p>
=	<p>Placed before a value, returns records containing a value equal to the query value.</p>	<p>=Smith finds all records for which the value in the query field is <i>Smith</i>. It also negates wildcard operators within the query value.</p> <p>For CIAI-enabled fields, if you type "=abc*", then the query becomes a case-sensitive query because you use an equal sign (=) as an operator in the query.</p>
<	<p>Placed before a value, returns records containing a value less than the query value.</p>	<p><6/20/01 finds all records in which the value of the query field is earlier than 20 June 2001. When entering a date, use the format that is specific to your implementation.</p>
>	<p>Placed before a value, returns records containing a value greater than the query value.</p>	<p>>5/31/01 finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.</p>
<>	<p>Placed before the value, returns records containing a value that is not equal to the query value.</p>	<p><>6/20/01 finds all records in which the date in the query field is not 20 June 2001.</p> <p><>Paris finds all the records in which the value in the query field is not <i>Paris</i>.</p>
<=	<p>Placed before a value, returns records containing a value less than or equal to the query value.</p>	<p><=500 finds all the records in which the value in the query field is less than or equal to 500.</p>
>=	<p>Placed before a value, returns records containing a value greater than or equal to the query value.</p>	<p>>=500 finds all records in which the value in the query field is greater than or equal to 500.</p>

Table 7-1 (Cont.) Simple Query Operators

Operator	Description	Example
NOT LIKE, not like	Placed before a value, returns records not containing the value.	NOT LIKE <i>Smi</i> * finds all records in which the value in the query field do not start with <i>Smi</i> .
IS NULL, is null	Placed in the query field, returns records for which the query field is blank.	IS NULL in the Due Date query field finds all records for which the Due Date field is blank.
IS NOT NULL, is not null	Placed in the query field, returns records for which the query field is not blank.	IS NOT NULL in the Due Date query field finds all records for which the Due Date field is not blank.
~	Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case.	~LIKE <i>Smi</i> * finds all records in which the value in the query field starts with <i>Smi</i> , <i>smi</i> , <i>SMI</i> , and so on. Using this operator might affect performance. You can enter a CIAI query expression for a contact as follows: [Last Name] ~Like abc*

Compound Query Operators

Table 7-2 shows compound query operators. In this table, operators appear in uppercase. However, query strings are case-sensitive. The operators do not have to be in uppercase.

When you perform a compound query, you must use parentheses to control the order in which the search for matching records is performed.

Table 7-2 Compound Query Operators

Operator	Description	Example
AND, and	Placed between values, returns only records for which all the conditions are true.	*performance* AND *memory* finds all records that contain both <i>performance</i> and <i>memory</i> in the query field.
OR, or	Placed between values, returns records for which at least one condition is true.	*performance* OR *memory* finds all records that contain either <i>performance</i> or <i>memory</i> in the query field. performance* OR memory* finds all records that start with either <i>performance</i> or <i>memory</i> in the query field.
NOT, not	Placed before a value, returns only records that do not contain the value.	*performance* AND NOT LIKE *memory* finds all records that contain <i>performance</i> but not <i>memory</i> in the query field. NOT (performance OR memory) finds all records that contain neither <i>performance</i> nor <i>memory</i> in the query field.
()	Placed before and after the values and operators that are processed first, regardless of the default processing order.	(sun OR moon) AND NOT stars returns records that contain <i>sun</i> or <i>moon</i> , but not <i>stars</i> , in the query field.

Table 7-2 (Cont.) Compound Query Operators

Operator	Description	Example
LIKE, like	Placed before a value, returns records containing the value.	<p>(performance* OR memory*) AND LIKE (problem) finds all records in which the query field starts with <i>performance</i> or <i>memory</i> and also includes <i>problem</i>.</p> <p>The LIKE operator is case sensitive. To find matches regardless of case, see Table 7-1, "Simple Query Operators".</p>

Tips for Queries

Note the following tips when you create and execute queries:

- The Siebel application automatically adds a wildcard to the end of your query. If you search for Siebe, then all words beginning with the letters Siebe are found.
- When you create a query, the records matching the query criteria appear in a list. While you work with the records in the list and move through the views within the current screen, the list continues to show the records that were found when you executed the query. The list is reset to the default list of records when you leave and then again access the current screen.
- If you no longer need the list of records in a query and want to reset the list, then click the current screen tab to return to the default set of records.
- If a predefined query created by your organization appears in the drop-down list for the Saved Queries field, then you cannot delete this query from the list. However, you can modify the query criteria and save the query using another name. For more information, see ["Refining Queries"](#) on page 7-3.
- You cannot query on Notes views when you are connected to the server.
- Any queries that execute in Administration screens against multi-value group fields are automatically appended by EXISTS(). Consequently, you can see every record, regardless of whether it is a primary record.
- When you create a query and navigate through the views, use the hyperlinks on the link bar to return to the queried list of records.
- If you execute a query that includes more than one consecutive blank space, and if you do not place quotes around the query, then the spaces are ignored, and you see inaccurate results.
- When the query results appear in list format, the first record is highlighted. It might appear as though the record you select before running the query appears again, but you are actually seeing a new set of records resulting from your query.
- In query mode, check boxes have three states: checked, unchecked, and intermediate. If you specify intermediate in a check box field while running a query, your Siebel Business application will return records that are checked and records that are unchecked.

Note: The visual representation of the intermediate state of the check box is browser dependant.

Related Topics

- ["Querying for Records in a Selection Dialog Box"](#) on page 5-5

- "Setting Up Default Queries" on page 13-7
- "Displaying Record Count" on page 6-9

About iHelp

iHelp is a guidance tool that delivers real-time assistance while you navigate through the Siebel application. At any time, you can drill down on one of the iHelp items to view detailed instructions about how to complete the task. iHelp shows instructions in step format and includes embedded view navigation links. In addition, iHelp can highlight important fields and buttons on the view associated with each step of the task to draw your attention to the controls you must use to complete the task.

After you launch an iHelp item, it remains active until you end it. If you launch iHelp, and navigate to a different screen, then the iHelp steps do not change. If iHelp is not running a task, and you navigate to a screen, then you see iHelp items related to that screen.

Figure 7-2 shows an example of the iHelp pane for the Accounts screen.

Figure 7-2 Example of an Expanded iHelp Item

The screenshot shows the Siebel Accounts screen with an expanded iHelp pane. The iHelp pane is titled "How do I..." and contains a list of steps for "Go to My Accounts". The steps are:

1. Go to My Accounts
2. Click on New button
3. Click on Activities view tab
4. Click on New button
5. Click on Contacts view tab
6. Click on New button
7. Click on Opportunities view tab

Below the steps, there is a "Return to Accounts iHelp" link. The main screen shows a table of accounts with columns: New, Name, Site, Parent, Main Pho, Status, Account T, Account T, Account C, and Fund Eligible. The table contains several rows of account data. Below the table, there is a detailed view for "Country Candy Company" with fields for Account Name, Site, Address, City, Zip Code, State, Country, Account Team, Main Phone #, Main Fax #, and URL.

Using iHelp to Complete Tasks

You can launch iHelp to review the steps in a task, and then perform the task yourself, or you can launch iHelp to drill down on different iHelp items and receive detailed instructions for each step in a task.

To use iHelp

1. Navigate to the screen.
2. Do one of the following:
 - From the application-level menu, choose View, then Action Pane, and then iHelp.
 - Click the How Do I button on the application toolbar.



The iHelp pane appears in the left side of the application window. The pane lists the iHelp items related to the current screen. The iHelp pane remains open until you close it.

3. In the iHelp pane, drill down on an item to launch iHelp.

Figure 7–2 shows an example of the iHelp pane for the Accounts screen.

4. Follow the instructions provided in the iHelp pane.

Some additional information is provided in the following table.

Click	To
A hyperlink in a step	Navigate to the screen or view to perform an action.
A step	Highlight a button in a form and a list or a field in a form to help you to complete a task.
	Expand the description of a step to show its details. The details might contain substeps.
	Collapse the description of a step.
Return to...	Return to the top-level list of iHelp items.
Click for Additional Steps	Access additional steps that are available because of certain met conditions. If this link appears in the iHelp pane, then you must complete each step in sequence before you can access the additional steps. If you do not complete each step, then an error message appears.

To close the iHelp pane

- In the upper right corner of the iHelp pane, click the Close button.

Using the iHelp Map

The iHelp Map is a view that displays the iHelp items available to you in the same format as the Site Map.

To use the iHelp Map

1. Do one of the following:
 - Choose Navigate, then Go to iHelp Map.
 - Choose Navigate, then Site Map, then iHelp Map, and then iHelp Map.

The iHelp Map screen appears.

2. To launch an iHelp item, click the iHelp item name.

Using Task UI

This chapter describes how to use the task user interface (UI) in the Siebel application. It includes the following topics:

- [About Task User Interface](#)
- [Using Task UI](#)
- [Navigational Buttons for Task UI](#)

About Task User Interface

Task UI is a wizard-like user interface that:

- Guides you through task execution.
- Allows you to navigate back and forward during the task execution.
- Allows you to resume or pause task execution at any point.

Task UI features help increase the efficiency of:

- Novice or intermittent users by guiding them through the execution of unfamiliar tasks.
- Experienced users who want to switch between multiple tasks throughout their workday.

Task UI includes the following features that support task execution:

- **Tasks Pane.** The left side of the screen contains a listing of the tasks available to you. These tasks relate to the current context. When you select a given task, the Tasks Pane shows the sequence of steps for that task.
- **Navigation Buttons.** The Task screen has a standard set of four buttons that control navigation through the task flow. It includes buttons to move forward and back through the task steps and provides the ability to pause a task for later resumption and to cancel a task. For more information about the navigational buttons, see "[Navigational Buttons for Task UI](#)" on page 8-2.
- **Radio Buttons.** Radio buttons provide support for decision-making within a task. The choices within a task determine the branches and screens that you can access.

After you launch a task item, it remains active until you complete it. If you launch Tasks, and navigate to a different screen, then the task items do not change. For more information about Task UI, see *Siebel Business Process Framework: Task UI Guide*.

Using Task UI

You can drill down on task items to launch the Task UI wizard and receive detailed instructions for each step in the task.

To use tasks

1. Click the Tasks button on the application toolbar.

The Tasks pane appears on the left side of the application window, and lists the task items related to the current screen. The Tasks pane remains open until you close it.

2. In the Tasks pane, drill down on a task item to launch the Task UI wizard.
3. Select one of the radio buttons to choose an option, and click Next.
4. Follow the instructions in the wizard.
5. After you complete the task, close the Tasks pane.

Navigational Buttons for Task UI

Table 8–1 shows the navigational buttons for the Task UI wizard. Many of these buttons can appear at the bottom of the Task UI wizard. Your Siebel application might contain additional buttons.

Table 8–1 Navigational Buttons in Task Wizard

Button	Description
Previous	Navigates to the previous step in the task. This button is disabled for the first step. This button might also be disabled for the steps that follow the step in which data is committed to the database.
Next	Navigates to the next step in the task. This button also validates your actions and prevents you from proceeding to the next step until the required criteria are met. This button is relabeled <i>Finish</i> when you reach the final step of the task.
Pause	Saves the task in its current stage and sends the task to your Inbox. You can launch the task later and resume the task from where you left off. You can set this option from your user preferences. For more information, see " Setting Pause Behavior for Task UI " on page 13-17.
Cancel	Deletes the task without saving any data, but if a task is previously saved, then restores the task to its previous state. The Pause and Cancel buttons are enabled for all steps. However, when the data is already committed, the Cancel button is disabled for the last step.
Submit	Writes data while in the middle of a task. Some data is posted to the database rather than queued until the end of the task.

Synchronizing Data

This chapter provides information about synchronizing data in the Siebel application. It includes the following topics:

- [About Database Synchronization](#)
- [Synchronization Process](#)
- [About Synchronizing with a Personal Information Manager Server](#)

About Database Synchronization

Database synchronization applies to you if you are a remote user of the Siebel application. You must synchronize data on a regular basis to maintain the database on your remote laptop.

The copy of the database on your laptop is generally called a local database. The Siebel application is the interface that allows you to add and manipulate information in the database. Using a dial-up connection, you synchronize your local database with the server database by sending data to the server and receiving data from the server. [Figure 9–1, "Synchronization Process"](#) shows the synchronization process.

For example, if you add several new opportunities to your local database, then you must synchronize this data, which is on your laptop, with the data on the server. This synchronization transfers the new data to the server. If, on the server, you are added as a team member to a new account, then you must synchronize data so that the data for this new account is added to your local database. For information about setting up synchronization preferences, see *Siebel Remote and Replication Manager Administration Guide*.

You synchronize data regularly for the following reasons:

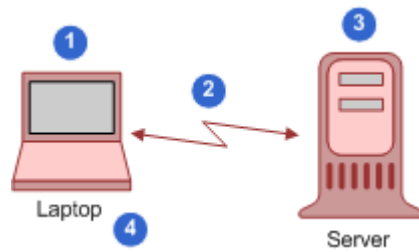
- To make sure your local database is current.
- To make sure the total time to synchronize is as short as possible. Regular synchronization results in shorter synchronization times.
- To share updates with colleagues.

Note: You must synchronize data in a timely manner so that the most up-to-date information resides on your laptop. Each organization has its own guidelines for the synchronization process.

Synchronization Process

[Figure 9–1](#) shows the synchronization process.

Figure 9–1 Synchronization Process



The synchronization process includes the following steps:

1. You make offline changes to the database on your laptop.
You initiate the synchronization process by choosing File, then Synchronize Database from the application-level menu.
2. You dial in and synchronize data.
3. The server accepts all the changes to the server database and any new or changed data from your laptop.
4. You see all the changes to your laptop database and any new or changed data from the server.

About Synchronizing with a Personal Information Manager Server

Siebel Server Sync is a server-side integration product that synchronizes Siebel Business Applications data with Personal Information Manager (PIM) server products. For example, your administrator can configure such synchronization so that you can synchronize calendar, contact, and other data between Siebel Business Applications and PIM products. For more information, see *Siebel Server Sync Guide*.

Sharing Information

This chapter describes the different ways to share information in the Siebel application. It includes the following topics:

- [Using the Inbox](#)
- [Running Reports](#)
- [Emailing, Faxing, Paging, and Sending Outbound Wireless Messages](#)
- [Creating Siebel Bookmarks](#)
- [Creating Shortcuts to Siebel Records](#)
- [Importing Data into the Siebel Application](#)
- [Exporting Data to an External File](#)

Using the Inbox

The Inbox provides you with a centralized list of items requiring your attention, such as approvals and notifications. The Inbox can include almost any business entity, including service requests, approvals, and opportunities.

When you select an item in your Inbox list, the Detail view in the bottom part of the application window is updated to show the fields for that type of business entity. You can see the details of the record without navigating to another screen. You can also perform default actions, such as approving an expense report, directly from the Inbox.

To check your Inbox

1. From the application-level menu, choose **Navigate**, then **Site Map**.
2. Click **Inbox**.
The Site Map displays the views available for the Inbox.
3. Click **Inbox Items List**.
4. In many cases, you can drill down on the **Name** field hyperlink to see details about the work item.

Running Reports

In the Siebel clients (Siebel Web Client, Siebel Mobile Web Client, and Siebel Developer Web Client), you run Siebel Reports in views. While in a view, you can perform a query, and then select the report you want to run. For more information, see [Chapter 7, "Locating Information Using Query and iHelp."](#)

You can monitor long-running reports, view previously run reports, and delete reports. For more information about the Siebel Reports user interface, see *Siebel Reports Guide*.

Note: Reports functionality is an optional extension to Siebel Business Applications.

To run a report

1. Navigate to the screen and view that contains the information for which you want to run a report.
2. (Optional) Limit report data by running a query.
3. On the application toolbar, click the Reports button.
The Run Report pane appears.
4. In the Run Report pane, complete the appropriate fields.
Some fields are described in the following table.

Field	Description
Report Name	Select an available report. The available reports apply to the screen and view to which you navigate.
Custom Name	Type a custom name for the report if you want to name the report a different name from the value in the Report Name field.
Output Type	Select the output type for the report.
Report Locale	Select the locale for the report.

5. Click Submit.
The designated report runs.
6. Click My Reports to navigate to the Reports view of the BI Publisher Reports screen.
A record for the run report appears in the Reports view.
7. Drill down on the Report Name field in the Reports view to display the report in a new window.
You can print the report by using the print feature for the application in which it appears.

Emailing, Faxing, Paging, and Sending Outbound Wireless Messages

You can send email messages, faxes, pages, and outbound wireless messages (for example, text messages or Short Message Service messages) from within the Siebel application. The following commands are available when you choose File on the application-level menu:

- **Send Email.** Allows you to send email directly from the Siebel application. For more information, see ["Setting Outbound Communications Preferences for Send Email"](#) on page 13-5.
- **Send Fax.** Allows you to send a fax directly from the Siebel application.
- **Send Page.** Allows you to page someone directly from the Siebel application.

- **Send Wireless Message.** Allows you to send a message to another person's wireless device from the Siebel application.

Sending a fax, page, or an outbound wireless message is similar to sending an email. Choose the appropriate Send command after you choose File from the application-level menu. If you cannot send a fax, page, or outbound wireless message, then contact your Siebel administrator.

The configuration of your Siebel application determines whether you have access to send functionality. For more information, contact your Siebel administrator.

Sending Email from the Siebel Application

Using the Send Email command, you can send email messages from any context (location) within the Siebel application. The Siebel administrator can configure the Siebel application so that you can use context-specific email message templates to improve efficiency and standardize replies for the types of communications that occur frequently.

[Figure 10-1](#) shows an example of the Send Email dialog box.

The Siebel application supports user choice regarding the software for Send Email. The choice of software is determined by the value of the Email Client user preference setting in your Siebel application.

Figure 10–1 Example of the Send Email Dialog Box

To send an email from the Siebel application

1. Navigate to the screen.
2. Select the record for which you want to send the email.
On some screens, data associated with the selected record might be inserted into the email.
3. From the application-level menu, choose File, then Send Email.

Note: On some screen, the Pick Recipients dialog box might appear. If this dialog box appears, then select a recipient (or select None) from the list, and click OK.

The Send Email dialog box appears.

4. Complete the appropriate fields in the dialog box.
Verify that the From field includes your profile name. If this field does not include your profile name, then select a profile name from the drop-down list for this field. If no profile is available, then contact your Siebel administrator.

You can select a template containing predefined text for the email from the drop-down list for the Body field.

5. (Optional) Complete the following additional steps:
 - a. Attach literature and other files to the email by clicking the Add literature or Attachment button next to the Attachments field.

Launching the Send Email dialog box from an attachment record automatically attaches the file in the attachment record to the email.

Note: If you attach multiple items (literature or attachments) to the email, then only the last item you attach appears in the Attachments field. To see a list of all attachments, click the Attachment button.

- b. If you select HTML as your Default Message Format user preference, then edit aspects of the message text, such as font size, font color, paragraph justification, and so on. For more information, see "[Using the HTML Editor](#)" on page 10-5.

The email recipient sees this formatting if the recipient's email client software supports HTML.

6. Click Send to send the email.

Using the HTML Editor

You can set your user preferences to allow you to use the HTML editor in the Send Email dialog box. For more information, see "[Setting Outbound Communications Preferences for Send Email](#)" on page 13-5.

In the Siebel application, you might come across various screens in which you can invoke the HTML editor. The HTML editor provides special editing controls that allow you to use supported HTML formatting, and also provides some standard editing features, such as cut and paste. [Figure 10-1](#) shows the buttons available in the toolbar for the HTML editor above the body of the message.

It is recommended that you use CTRL+Enter to move to a new line using the HTML editor. Doing so avoids empty rows.

Creating Siebel Bookmarks

A Siebel bookmark is a URL that links to a specific record in the Siebel application. A Siebel bookmark included in an email message or a document allows a user to click a link to navigate directly to a record if the Siebel application is active on the user's computer.

When you click the link in an email message or a document, a new browser window might open to access the Siebel application. If an error message appears indicating that you cannot access the Siebel application from this window, then close the window, open a new window, and paste the URL into the new window. If the Siebel application is running on your computer, then you can also paste the URL into the browser for that application.

The procedure in this topic shows how to add a Siebel bookmark to an email or a document by copying and pasting, but you can also complete this task by dragging and dropping.

To add a Siebel bookmark to an email or a document

1. Navigate to and select the Siebel record to which you want to create a link.
2. Complete either of the following steps:
 1. Select the URL in the browser, and then copy and paste this URL to an email or document.

A hyperlink is created to the Siebel record from the email or the document.
 2. From the application-level menu, select File, then Create Bookmark, select the URL in the Get Bookmark URL dialog box, and then copy and paste this URL to an email or document.
 3. Click OK to close the Get Bookmark dialog box.

A hyperlink is created to the Siebel record from the email or the document.

Creating Shortcuts to Siebel Records

A shortcut allows you or another user to click a link to navigate directly to a record. If the Siebel application is not running when you click the link for a shortcut, then you must first log in to the Siebel application.

To create a shortcut to a Siebel record

1. In the Siebel application, locate and select the Siebel record for which you want to create a shortcut.
2. Select the URL content in the address field of the browser.
3. Copy and paste the URL content to another location, such as an email message or a document.

The link for the shortcut is created at the location.

Importing Data into the Siebel Application

You can import data into only certain parts of the Siebel application. For example, you cannot import contacts into the My Personal Contacts view. However, you can add personal contacts by creating new records in the Personal Contacts view or by synchronizing with a Personal Information Manager (PIM), such as Microsoft Outlook.

If you want to import accounts or opportunities, then contact your Siebel administrator. You can import a maximum of 2000 records at one time.

To import data into the Siebel application

1. Navigate to the screen into which you want to import data.

Note: You cannot use the import feature from a view.

2. Click the menu button, and then click Import.

The Import dialog box appears.
3. In the Import dialog box, do the following:
 - a. Click Choose File for the Input File field to select the file to import.

A dialog box appears.
 - b. Select the file you want to import, and click Open.

- c. Use the Input Format option buttons to select the format of the input source file.

Note: The file you import must match the format you select in the Input Format option.

- d. Use the Input Source option buttons to define the type of mapping you want to use.

The Auto Mapping option uses the structure of the import file to map fields. The Predefined Mapping option uses a set format that is based on the source application, for example, ACT!. When you select the Predefined Mapping option, you must select the corresponding source from the Input Source drop-down list.

Note: When importing using predefined mapping, all the fields must be defined in the Import Object in Siebel Tools. A certain format is required for predefined mapping. For more information, contact your Siebel administrator.

- e. Use the Conflict Resolution option buttons to select the method you prefer to use if the import process encounters a conflict between records.
- f. Click Next.

If you choose the Predefined Mapping option, then go to step 5. If you choose the Auto Mapping option, then the Import mapping dialog box appears.

4. Verify that the mappings in the Field Mappings list are correct.

To update a mapping, select the field in the Import Field list, select the corresponding Siebel field in the Siebel Field list, and then click Update Mapping. The mapping in the Field Mappings list is updated.

5. Click Next.

The records from the import file are imported into the Siebel database. When the import finishes, a status dialog box appears.

6. Click OK to close the dialog box, or click View Log to review information about the import.

Exporting Data to an External File

The export feature is useful when you query for specific data and want to export that data to a separate file. The exported data in the file might be in Microsoft Excel, but you can import the data into other applications.

Dates or numbers in exported data are formatted according to your computer's regional settings. You can configure your regional settings using the Microsoft Windows Control Panel. In some cases, the formatting depends on the regional settings on the company server. For more information, contact your Siebel administrator.

You export from a list. You can export a single record or a list of records.

Note: If a record you export includes a multi-value group field, then only the primary value for that field is exported.

To export data to an external file

1. Navigate to the screen from which you want to export data, and run a query to display the records.
2. (Optional) Use the Columns Displayed function to add columns to and remove columns from the list.

For more information, see "[Organizing List Columns](#)" on page 6-16.

3. Click the menu button, and then click Export.

The Export dialog box appears.

4. In the Export dialog box, do the following:
 - a. Use the Rows To Export option buttons and Columns To Export option buttons to define the rows and columns you want to export.

Note: The order of exported columns is determined in Siebel Tools by the order of the Sequence property values of the columns as they are set in the List Column object. For more information about properties of the List Column object, see *Siebel Object Types Reference*.

- b. Use the Output Format option buttons to define the format of the output document.

To correctly export Siebel data to a Microsoft Excel document, select the Tab Delimited Text File option. Select the Text File With Delimiter option to add quotes around each field value to help differentiate between each column value.

Note: For numeric fields, the number of digits to the right of the decimal point that are exported to the document is determined by the regional settings of your operating system. Modifying the operating system settings allows for more digits, up to a maximum value of nine digits to the right of the decimal point.

- c. Click Next.

Note: The export process can take several minutes if you export a large amount of data. A message showing the current status of the export appears (and is periodically updated) at the top of the Export dialog box. Performance might be adversely affected if you export more than 50,000 records.

After all of the export data is retrieved, the Show all downloads link appears in the bottom right corner of the screen, and a field containing the external file appears in the bottom left corner of the screen. You can click the Show all downloads link to use your browser to access and manage all files that you export.

5. From the drop-down list for the field containing the external file, select Show in Folder to see the location of the external file.

You can access this file and modify it.

6. Close the Export dialog box, and click the X next to the Show all downloads link to hide the link and the field containing the external file.

Using the Calendar

This chapter describes how to use the calendar. It does not apply to users who integrate Microsoft Outlook with their Siebel Business Applications. It includes the following topics:

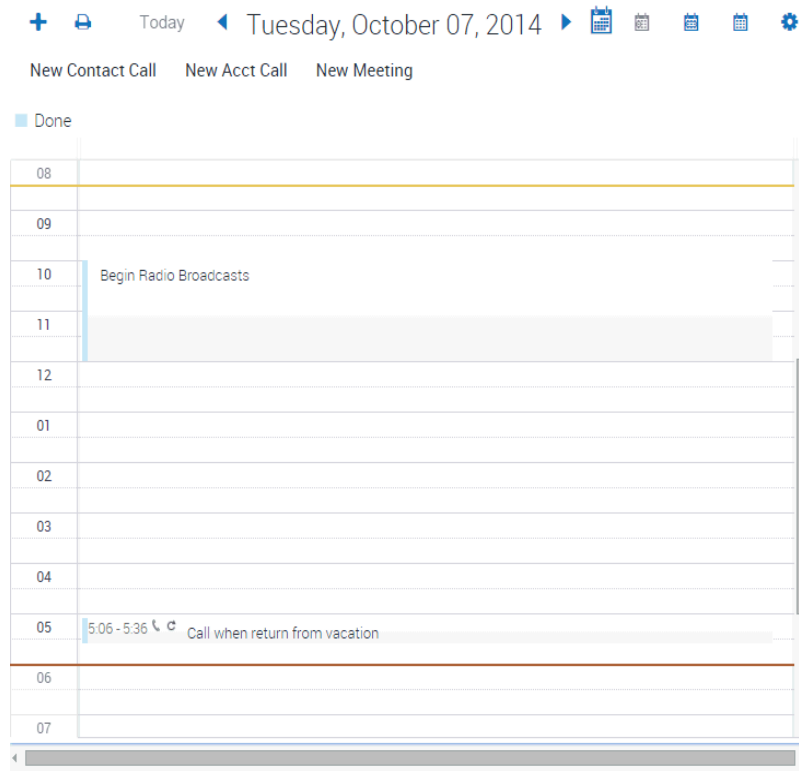
- [About the Calendar](#)
- [About Calendar Formats](#)
- [About Calendar Views](#)
- [About Viewing Activities](#)
- [About Activity Defaults](#)
- [About Recurring Activity Defaults](#)
- [About Activity Fields](#)
- [About Using the Participant Availability Subview](#)
- [About Using Group Calendars](#)
- [Viewing Calendar Activities](#)
- [Adding Activities to the Calendar](#)
- [Deleting Calendar Activities](#)
- [Creating Recurring Calendar Activities](#)
- [Deleting Recurring Calendar Activities](#)
- [Adding Activities in the To Do List](#)
- [Marking To Do Activities Complete](#)
- [Changing Activities](#)
- [Rescheduling Activities](#)
- [Adding Participants to Activities](#)
- [Removing Participants from Activities](#)
- [Reassigning Activities](#)
- [Changing the Time Zone in Calendar](#)
- [Granting Access to Your Calendar](#)
- [Viewing Calendars of Other Users](#)

About the Calendar

The Calendar screen allows you to manage your time and scheduled activities. You can choose the visual format that you want for the calendar. These formats include the Daily, Weekly, or Monthly calendar format. In the Calendar screen, you can schedule activities, view activities, invite participants to meetings, and view your tasks in a To Do list.

Figure 11–1 shows an example of the Calendar screen.

Figure 11–1 Example of the Calendar Screen



Each activity that appears in the calendar is highlighted in the color associated with the Status field value of that activity. The color legend for the calendar shows only those colors that appear in the displayed calendar, not all possible colors. The Siebel administrator can change the colors for Status field values and change the field that determines activity color from the Status field to another field, such as the Type field. For more information about customizing these colors and fields, see *Configuring Siebel Open UI*.

All-day events appear in a reserved slot at the top of the calendar screen. By default, the all day slot does not appear in the calendar, and must be enabled by your Siebel administrator. For more information about customizing the calendar all day slot, see *Configuring Siebel Open UI*.

Your working hours for the current date and future dates are denoted by a yellow line that represents the beginning of your workday (or the current time), and a red line that represents the end of your workday. You can change the start time and the end time of your workday. For more information about changing your workday start and end times, see ["Customizing the Length of a Workday"](#) on page 13-13.

In the Activities screen, you can create an activity with a planned start time, and the activity is automatically placed on your calendar. Changing the information for a scheduled activity on the calendar changes the same information in the Activities screen. Similarly, changing information about an activity in any Activities screen changes the same information in the calendar.




Some views in the Calendar screen display a To Do list. Activities that you specify as To Do activities appear in your To Do list. You can view your uncompleted To Do activities in this list.

About Calendar Formats

The configuration of your Siebel application determines the availability of certain features. Therefore, the calendar formats you see can differ from the calendar formats described in this topic. Calendar format buttons appear in the Calendar screen.

Table 11-1 describes the calendar format buttons.

Table 11-1 Calendar Format Buttons

Button	Name	Description
	Switch to daily view button	Displays your activities that are scheduled for the selected day.
	Switch to weekly view button	Displays your activities that are scheduled for the selected week. You can designate a 5-Day-Weekly format or a 7-Day-Weekly format in your user preferences. For more information, see " Setting Up Default Calendar Formats " on page 13-14.
	Switch to monthly view button	Displays your activities that are scheduled for the selected month. In the Monthly calendar format, you can place your cursor over a day to see a full list of the day's activities.

If the current date appears in the calendar format, then that date is automatically selected and highlighted in a color (for example, yellow) when you access a calendar. If you click a time slot in the calendar, then that time slot is highlighted in a color (for example, blue).

You can navigate to a date in calendar formats in the following ways:

- Click the left arrow button to the left of the calendar title to navigate to the previous calendar interval and the right arrow button to the right of the calendar title to navigate to the next calendar interval.

The calendar title determines the calendar interval to which you navigate. For example, if the calendar title is August 6 - 12, 2012, then the calendar is in the Weekly calendar format. When you click the left arrow button, you navigate to the calendar for the previous week, and when you click the right arrow button, you navigate to the calendar for the next week.

- Click the Today button to navigate to the current date when the current date does not appear in the displayed calendar format.
- Click the calendar select button to navigate to a date. This date does not have to appear in the displayed calendar format.

When you click the calendar select button, you access the calendar control. Unlike the calendar control for fields, the calendar control for the Calendar screen does not include an OK button and a Now button that you can click to select a date. In the calendar control for the Calendar screen, you click a date to select the date. For

more information about the calendar control, see "[About the Calendar Control](#)" on page 4-6.

- In the Monthly calendar format, click a date in the calendar.

About Calendar Views

Calendar views are available in screens, such as Accounts, Contacts, Campaigns, Projects, and Opportunities. Each Calendar view allows you to create activities without navigating to the Calendar screen and leaving the current screen.

Calendar views in screens allow you to associate activities with an active record. For example, if you create a new activity in the Calendar view of the Accounts screen, then the new activity appears with the Account and Site fields populated from the active account record.

You can navigate to a date in Calendar views in the following ways:

- Select values in the date value fields at the top of the view, and click Go.
- Click the Today button to navigate to the current date when the current date does not appear in the displayed calendar.

This date navigation is available only if administrators configure calendar views in screens for the Siebel Open UI client. For more information this configuration, see *Configuring Siebel Open UI*.

About Viewing Activities

Activities can appear in the Activities screen, in the Calendar, and in the To Do list. The place where an activity appears depends on the place where you create it. [Table 11-2](#) explains where activities appear.

Note: You cannot query for activities in the calendar.

Activities cannot appear in the Calendar and the To Do list at the same time.

Table 11-2 *Where Activities Appear*

If you create an activity here...	Then the activity automatically appears here...	Comments
Calendar screen	Calendar screen Activities screen	None.
To Do list	To Do list Activities screen	None.

Table 11–2 (Cont.) Where Activities Appear

If you create an activity here...	Then the activity automatically appears here...	Comments
Activities screen	The location associated with value you select from the drop-down list for the Display In field	<p>Values in the drop-down list for the Display In field include: Calendar and Activities, To Do and Activities, Activities Only, and Communication and Activities.</p> <p>If you choose Calendar and Activities, but do not assign a start time to the activity, then the activity does not appear in your calendar.</p> <p>If you choose Communication and Activities in the Display In field and Email - Inbound in the Type field, then the activity appears in Communications List view of the Communications screen.</p>

About Activity Defaults

When you create a new calendar activity, some fields are populated with default values. [Table 11–3](#) shows these values as they appear in the preconfigured Siebel application.

Table 11–3 Default Values for Calendar Activity Fields

Field	Default Value
Type	Appointment.
Start	<p>Date and time that is determined by the way you create the activity.</p> <p>If you select a single time slot or multiple time slots in the calendar, then the date and start time for that time slot or group of time slots.</p> <p>If you select the + (plus sign) button, then the calendar date to which you navigate and the start time of the time slot that begins after the current time. For example, if the current time is 11:02 A.M. and the calendar interval in your user preferences is 15 minutes, then the start time defaults to 11:15 A.M.</p>
Duration	Default value, in minutes, in your user preferences.
End	Start time plus the value in the Duration field.
Owner	Your user ID in the Siebel application when you view your calendar, and another user ID when you view another user's calendar.

About Recurring Activity Defaults

When you create a recurring activity, the Repeat Until field defaults to a predetermined value that is based on the value you select from the drop-down list for the Repeat Frequency field. You can change this predetermined value as needed.

[Table 11–4](#) shows the default values for the Repeat Until field. For more information about creating recurring activities, see "[Creating Recurring Calendar Activities](#)" on page 11-10.

Table 11–4 Default Values for Repeat Until Field

If Repeat Frequency value is...	Then the default Repeat Until value is...
Daily	Today plus 7 days
Weekly	Today plus 90 days

Table 11–4 (Cont.) Default Values for Repeat Until Field

If Repeat Frequency value is...	Then the default Repeat Until value is...
Monthly	Today plus 6 months
Quarterly	Today plus 2 years
Yearly	Today plus 10 years

About Activity Fields

Note the following points when you work with calendar activities:

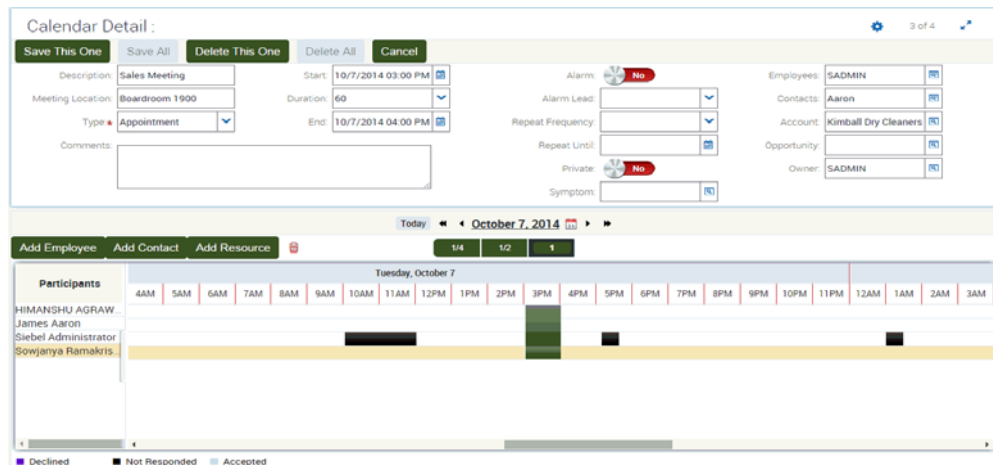
- Selecting a value in the Repeat Frequency field automatically sets a value in the Repeat Until field and determines that the activity is recurring.
- The date and time in the Start field cannot be later than the date and time in the End field.
- If you select the Alarm check box in the Calendar Detail form of a calendar activity, and you select the Done check box in the Activity form of that calendar activity, then the Alarm check box is cleared.

About Using the Participant Availability Subview

The Gantt chart, also called the Participant Availability subview, that appears below the Calendar Detail form for all nonrecurring activities can provide you more information about an activity and its participants. [Figure 11–2](#) shows an example of the Participant Availability subview.

If you do not see the Gantt chart in the Participant Availability subview, then you might see a large button called Show Participant Availability. Click that button to see the Gantt chart. Gantt charts are not available for recurring activities.

Figure 11–2 Example of Participant Availability Subview



The following information can help you to use this subview:

- In the Participant Availability subview, click Add Employee, Add Contact, or Add Resource to add new participants to an activity.
- In the Participant Availability subview, click the participant name in the Participants column, and click Remove Participant to remove an existing participant from an activity.
- All the schedules you see in the subview are converted to the time zone specified in your time zone preferences. For example, if your calendar displays Pacific time, and you are viewing an activity involving a user in the Eastern time zone, then the Eastern time zone user's schedule is converted to Pacific time for you. If the Eastern time zone user is looking at the same activity in the calendar, then the schedule is converted to Eastern time.
- You cannot use the Participant Availability subview for a recurring activity.
- Employee work hours have a white background, and non-work hours have a dark gray background.
- Scheduled activities appear as green blocks on the calendar. You can change the start and end times of the current activity by placing your cursor over either line, clicking, and dragging the line to the time you want.
- Any changes you make in the Participant Availability subview are automatically reflected in the Calendar Detail form. Likewise, any changes you make in the Calendar Detail form are automatically reflected in the Participant Availability subview.
- Contacts appear in the Participant Availability subview, but have no associated schedules.
- Icons indicate the participant type. A face indicates an employee, a phone book indicates a contact, and a projection screen indicates a resource.
- You can choose to display only your work hours or all 24 hours of the day. To make this choice, select the value from the Show field in the Participant Availability subview. You can also set up this preference in your user preferences. For more information, see "[Setting Up Default Participant Chart Display](#)" on page 13-15.
- Place your cursor over a participant's name to find out more information about that participant, including title, account, and time zone.
- You can advance the Gantt chart to a future date by using the horizontal scroll bar at the bottom of the chart. If you want to see more than three days after the activity's current date, then you must reset the start date in the Calendar Detail form.

About Using Group Calendars

You might want to see certain calendar activities common to all of your colleagues, such as trade shows, training events, holidays, and so on. Your Siebel administrator can create a user ID representing your group and give you and your colleagues access to this user ID. For more information, contact your Siebel administrator.

About Viewing Calendar Availability

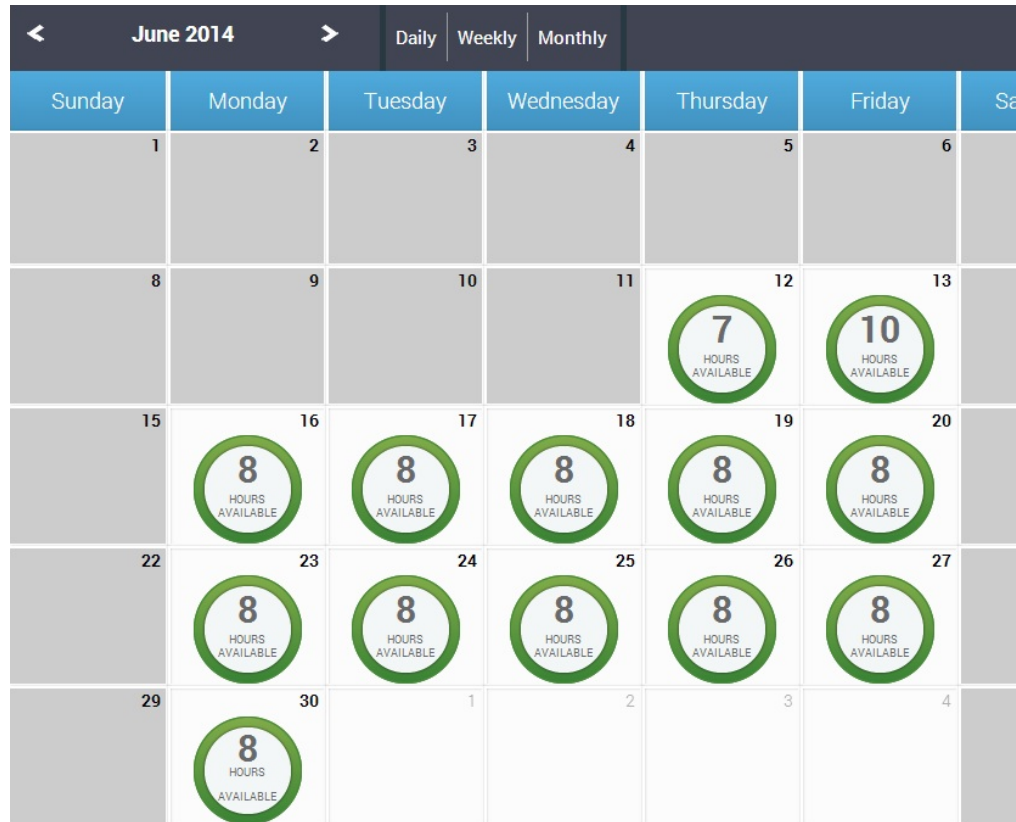
When trying to find a time to schedule a meeting, you might want to consult a breakdown of how many available hours a user has on a particular day. If calendar

availability is enabled, when you open a monthly view of calendar, it will display the available hours for every day in the future. The available hours will be represented by a rounded number surrounded by a circle. Available time is calculated by taking the number working hours defined by the user, and subtracting any events already scheduled for that day.

Figure 11-3 shows an example of calendar availability.

The calendar availability is available only if administrators configure Siebel Open UI to allow it. For more information this configuration, see *Configuring Siebel Open UI*.

Figure 11-3 Example of Calendar Availability



Viewing Calendar Activities

You can view and manage activities in the daily, weekly, or monthly format of your calendar. You can specify any of the calendar formats as the default format in the Calendar screen. For more information, see ["Setting Up Default Calendar Formats"](#) on page 13-14.

Note: You cannot query for activities in the calendar.

To view calendar activities

1. Navigate to the Calendar screen.

The calendar appears, showing the Daily calendar format.

2. (Optional) Click a button to change the calendar format.
For more information, see ["About Calendar Formats"](#) on page 11-3.
3. Place your cursor over the hyperlink for an activity description to view details about that activity.

Adding Activities to the Calendar

In the Daily and Weekly calendar format, the free time slots associated with your work hours are a lighter color than the time slots associated with your non-work hours, but you can add activities to any time slot. You can designate the time your work hours in your user preferences. For more information, see ["Customizing the Length of a Workday"](#) on page 13-13.

To add an activity to the calendar

1. Navigate to the Calendar screen.
2. (Optional) Navigate to a date in the calendar.
If you complete this step, then the value in the Start field of the Calendar Detail form includes the date to which you navigate. The Calendar Detail form appears when you complete the next step. For information about navigating to a date in the calendar, see ["About Calendar Formats"](#) on page 11-3.
3. In the Daily, Weekly, or Monthly calendar format, click + (plus sign).
The Calendar Detail form appears.
4. Complete the fields.
5. Click Save This One.
The activity appears in your calendar and in the Activities screen.

Entering Activities Directly in the Calendar

In the Daily and Weekly calendar format, you can enter an activity directly in the calendar.

To enter an activity directly in the calendar

1. Navigate to the Calendar screen.
2. In the Daily or Weekly calendar format, click the time slot for which you want to create the activity.
If you want to create an activity that spans multiple time slots, then click the first time slot, and without lifting the mouse, drag and drop the activity to the last time slot.
3. In the New Event dialog box, enter a description, and click OK.
The activity appears in your calendar and in the Activities screen.

Deleting Calendar Activities

You can delete an activity from any calendar format in the Calendar screen. However, you cannot delete read-only activities. Read-only activities include the following activities:

- Some activities imported from other applications, such as Microsoft Outlook or Microsoft Exchange.

- Activities that you do not own in your calendar.
 - Activities that you can only view in the calendars of other users.
 - Activities that are protected by industry-specific functionality.
- For example, some call records in Siebel Life Sciences are read-only. You can delete the call record, but not the calendar activity for the call record.

To delete an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.

The Calendar Detail form appears.

3. Click Delete This One.

If you are the primary employee for the activity, then the activity is deleted from every participant's calendar. If you are a non-primary employee for the activity, then the activity is deleted from only your calendar.

Creating Recurring Calendar Activities

You might find that you want to schedule recurring activities, such as meetings. Instead of creating a new meeting every time a recurring meeting occurs, you can create one activity and set the activity to repeat at specific times to create a series of meetings.

Note: When you modify a recurring meeting and click Save All, your changes are applied to the current meeting and to every future meeting in the series. However, your changes are not applied every previous meeting in the series.

To create a recurring calendar activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click + (plus sign).

The Calendar Detail form appears.

3. Complete the fields.

Some fields are described in the following table.

Field	Description
Repeat Frequency	Select a value to designate how often you want this activity to recur. For more information about the Repeat Frequency value, see Table 11-4, "Default Values for Repeat Until Field" .
Repeat Until	(Optional) Select the date on which you want the activity to stop recurring by clicking the Calendar button in this field.

4. Click Save This One.

Changing Recurring Activities to Nonrecurring Activities

You can change a recurring activity to a nonrecurring activity.

To change a recurring activity to a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. From the drop-down list for the Repeat Frequency field, choose Non-Repeating.
4. Click Save All.

All future instances of the activity are deleted. The activity for the current day and previous days are not deleted.

Deleting Recurring Calendar Activities

When you delete a recurring activity, you can choose to delete just one instance or every instance of the activity.

Deleting One Instance of a Recurring Activity

Complete the procedure in this topic to delete one instance of a recurring activity.

To delete one instance of a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. Click Delete This One.

This instance of the activity is deleted. Every other instance is still scheduled.

Deleting Every Instance of a Recurring Activity

Complete the procedure in this topic to delete every instance of a recurring activity.

To delete every instance of a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. Click Delete All.

Every instance of the recurring activity from the current day forward is deleted. Any instances of the recurring activity before the current day remain on the calendar.

Adding Activities in the To Do List

The To Do list appears in the Calendar screen to the right of the calendar format.

To Do activities have the following characteristics:

- They are activities that have a Type field value of To Do.

- They carry forward every day until they are marked complete.
- They do not appear in the Calendar itself.

Note: Alternatively, you can add a new To Do activity in the Activities screen and select To Do and Activities from the drop-down list for the Display In field.

To add a To Do activity

1. Navigate to the Calendar screen.
2. In the To Do list, click New.
A blank row appears.
3. Enter values in the Description and Due fields.
4. (Optional) To add more information to the activity, drill down on the Description field hyperlink of the activity.

Marking To Do Activities Complete

To Do activities remain in your To Do list and carry forward to the next day until they are complete. Use the Done check box to mark a To Do activity as complete. After an activity is marked complete, that activity does not appear in the To Do list when the Calendar screen is refreshed. Only uncompleted items appear in the To Do list.

To mark a To Do activity as complete

1. Navigate to the Calendar screen.
2. In the To Do list, select the To Do activity you want to mark as complete.
3. Select the Done check box.

Changing Activities

After adding an activity to your calendar, you can change the activity. You drill down on the activity and make changes in the Calendar Detail form.

Changing Nonrecurring Activities

Complete the procedure in this topic to change nonrecurring activities.

Note: Each time you create or modify an activity in the calendar, you can choose to automatically notify any employees who are associated with the activity. For more information, see "[Setting Up Email Prompts for Meetings](#)" on page 13-13.

To change a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.

3. Make the necessary changes, and click Save This One.

Changing Recurring Activities

Complete the procedure in this topic to change recurring activities. When you change a recurring activity, you must make sure to save it properly.

To change a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.

The Calendar Detail form appears.

3. Make the necessary changes, and click one of the following buttons:
 - **Save This One.** Saves the changes you make to the current recurring activity, changes the activity to a non-recurring activity, and does not change every other recurring activity in the series.

For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you change the August 23 instance of the activity and click Save This One, then only the August 23 activity changes. This activity also becomes non-recurring and is no longer associated with the other activities in the series.

- **Save All.** Saves changes you make to the current recurring activity and to all subsequent recurring activities in the series. However, the changes are not applied to any activities that are scheduled before the current activity.

For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you change the August 23 activity and click Save All, then the activities scheduled for August 23, August 24, and August 25 change, but the activities scheduled for August 21 and August 22 do not change.

Rescheduling Activities

You can use different methods to reschedule activities.

Rescheduling Activities by Changing Date Fields

In any calendar format, you can change date fields to reschedule activities.

To reschedule an activity by changing date fields

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.

The Calendar Detail form appears.

3. Change the value in the Start field.
4. Change the value in the End field.

Rescheduling Activities by Using Drag-and-Drop

In the Daily and Weekly calendar format, you can use drag-and-drop functionality to reschedule activities.

Note: You cannot drag appointments across calendar formats. For example, you cannot drag an appointment from the Daily format to the Monthly format.

To reschedule an activity by using drag-and-drop

1. Navigate to the Calendar screen.
2. In the Daily or Weekly calendar format, click the time slot for the activity in the calendar, and without lifting the mouse button, drag and drop the activity to a different time slot in the calendar.

Rescheduling Activities by Stretching Activity Borders

In the Daily and Weekly calendar format, you can stretch the bottom cell border for an activity to reschedule the activity.

To reschedule an activity by stretching the activity border

1. Navigate to the Calendar screen.
2. To change an end time for the activity, do the following:
 - a. Place the cursor over the bottom border of the activity.
A line with arrowheads appears.
 - b. Click and drag activity's bottom border to an earlier or later time.

Adding Participants to Activities

When you add an activity to your calendar, you might also want to add the people who participate in the activity. You can add participants to the activity on your calendar. Participants can include contacts and employees.

Participants can also include resources, such as a projector or a conference room. [Figure 11-2, "Example of Participant Availability Subview"](#) shows an example of the Participant Availability subview.

Adding Contacts to Activities

You can add contacts to activities.

To add contacts to an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. In the Participant Availability subview, click Add Contact.
The Add Contacts dialog box appears.
4. Select one or more contact records.
5. After you select the contacts you want to add, click OK.
The selected contacts appear in the Participant Availability subview and are part of the activity.

Adding Employees to Activities

You can add employees to an activity.

To add employees to an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. In the Participant Availability subview, click Add Employee.
The Add Employees dialog box appears. If a large number of employees appears, then you can use the Query button in the Employees list to find an employee.
4. Select one or more employee records.
5. After you select the employees you want to add, click OK.
The selected employees appear in the Participant Availability subview and are part of the activity.
6. (Optional) Review the Participant Availability subview to verify an employee's availability.

Adding Resources to Activities

You can add resources to an activity.

To add resources to an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears with the Participant Availability subview beneath it.
3. In the Participant Availability subview, click Add Resource.
The Pick Resource dialog box appears.
4. Query for the type of resource you are looking for.
5. Select one or more records, and click Check Availability.
Only the resources that you select in Step 4 appear. A check mark appears in the Availability column for any resource that is available during the time of the activity.
6. Select the available or unavailable resources that you want to add to the activity, and then click OK.
The resources appear in the Participant Availability subview.

Removing Participants from Activities

You can remove contacts and employees from an activity using the Calendar Detail form.

Removing Contacts from Activities

You can remove contacts from activities.

To remove contacts from an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. To remove contacts, do the following:
 - a. In the Contacts field, click the select button.
The Contacts multiple selection dialog box appears showing the list of selected contacts for the activity.
 - b. Select the contacts that you want to remove from the activity, and click Remove.
The removed contacts no longer appear in the list of selected contacts.
 - c. Click OK.

Removing Employees from Activities

You can remove employees from activities.

To remove employees from an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears.
3. To remove employees, do the following:
 - a. In the Employees field, click the select button.
The Employees multiple selection dialog box appears showing the list of selected employees for the activity.
 - b. Select the employees that you want to remove from the activity, and click Remove.
The removed employees no longer appear in the list of selected employees.
 - c. Click OK.

Removing Participants from a Nonrecurring Activity

You can remove an employee, a contact, or a resource from a nonrecurring activity using the Participant Availability subview.

To remove a participant from a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.
The Calendar Detail form appears with the Participant Availability subview beneath it.

3. Click the participant name in the Participants column to select the participant you want to remove.
4. Click Delete.

The participant is deleted from the activity.

Reassigning Activities

After creating an activity and adding employees to it, you might want to reassign the activity to a different employee. That is, you might want to make a different employee the primary employee for the activity.

To reassign an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly calendar format, click the hyperlink for an activity description to access the activity.

The Calendar Detail form appears.

3. In the Employees field, click the select button.

The Employees multiple selection dialog box appears showing the list of selected employees for the activity, and the primary employee appears with a check mark in the Primary field.

You must change the primary employee to reassign the activity.

4. If the employee to whom you want to assign the activity appears in the list of selected employees, then do the following:
 1. Click the Primary field in the record for this employee, and click OK.

The activity is reassigned.
 2. If the previous primary employee is no longer involved with the activity, then access the Employees multiple selection dialog box again, and remove that employee from the list of selected employees.
5. If the employee to whom you want to assign the activity does not appear in the list of selected employees, then do the following:
 - a. Click Show Available to show the list of available employees for the activity.
 - b. Select the employee to whom you want to assign the activity, and click Add.

The added employee appears in the list of selected employees.
 - c. Click the Primary field in the record for the added employee.
 - d. Click OK.
 - e. If the previous primary employee is no longer involved with the activity, then access the Employees multiple selection dialog box again, and remove that employee from the list of selected employees.

Changing the Time Zone in Calendar

You can change time zone in the Calendar screen and the Calendar views. You might want to change the calendar time zone if you travel between time zones.

Note: You can set a default time zone for your calendar in your user preferences. For more information, see "[Setting a Default Time Zone](#)" on page 13-2.

To change the time zone for the calendar

1. Navigate to the Calendar screen.
2. Click ... (Advanced Calendar Settings).
The Settings dialog box appears.
3. From the drop-down list for the Time Zone field, choose the appropriate time zone, and click OK.

The calendar times appear in the time zone that you select.

Granting Access to Your Calendar

When working with your team members, you might want to allow them to see your activities or to add activities to your schedule. To grant other people access to your calendar, you add team members in the Access List, and give them view or update privileges.

Note: Calendar sharing can result in the routing of numerous activities to mobile clients.

To give others access to your calendar

1. Navigate to the Calendar screen.
2. On the link bar, click Access List.
The Calendar Access list appears.
3. Click New.
The Add Employees dialog box appears.
4. Select the record for an employee, and then click OK.
The Calendar Access list appears again. The employee you select appears in the list, and that employee can now view your calendar.
5. (Optional) To allow the employee to add activities to your calendar, select the Allow Updates check box.

Viewing Calendars of Other Users

You can view only calendars to which other users grant you access. If you are a manager, then you can view the calendars of your direct reports.

Note: If your job often requires you to access another user's calendar, then you might want to set up that user's calendar as your default calendar. You can perform this setup in your user preferences. For more information, see "[Setting Up Another User's Calendar as Your Default Calendar](#)" on page 13-14.

To view the calendar of another user

1. Navigate to the Calendar screen.
2. Click ... (Advanced Calendar Settings).
The Settings dialog box appears.
3. From the drop-down list for the Owner field, choose the user of the calendar you want to see, and click OK.
The other user's calendar appears.

Customizing Home Pages

This chapter describes information relating to customizing the home page for your Siebel application. It contains the following topics:




- [About Home Page Controls](#)
- [Editing the Layout of Home Pages](#)

About Home Page Controls

Use the controls that appear in the top right corner of each list and form to change the layout of the home page for your Siebel application. The changes you make to the layout using these controls remain in effect until you change the layout again.

[Table 12-1](#) describes these controls.

Table 12-1 Home Page Controls







Option	Description
	Hides the list or form and temporarily removes it from the home page. You must edit the layout of the home page to place the list or form back on the home page.
	Collapses the list or form to its minimal size showing no records.
	Expands the list or form to its standard size.

Editing the Layout of Home Pages

The edit layout function lets you access more advanced layout editing functions, such as showing hidden lists or forms, collapsing or expanding all the available lists and forms at once, and restoring the default layout. You can use the edit layout function to edit both the home page for your Siebel application and screen home pages. The changes you make remain in effect until you change the layout again.

To edit the layout of a home page

1. At the home page, click Edit Layout.
2. In the Edit Layout form, click the controls to change each list or form that appears. The controls are described in the following table.

Control	Description
	Collapses the list or form to its minimal size showing no records.
	Expands the list or form to its standard size.
	Moves the list or form up on the page to reposition it above other lists and forms on the page.
	Moves the list or form down on the page to reposition it below other lists and forms on the page.
	Hides the list or form in the home page.
	Shows a previously hidden list or form and places it back on the home page.

- To apply the same action to all forms and lists at the same time, click the menu button, and then click an option.

The options are described in the following table.

Option	Description
Hide All Applets	Removes all lists and forms from the home page, and the home page is blank.
Show All Applets	Places all the lists and forms back on the home page.
Collapse All	Collapses all lists and forms on the home page.
Expand All	Expands all lists and forms on the home page.

- To restore the default layout for the home page, click Default Layout.
- Click Done.

The home page appears in the layout you define.

Setting User Preferences

This chapter describes how to set user preferences in your Siebel application. It includes the following topics:

- [About User Preferences](#)
- [Setting a Default Time Zone](#)
- [Setting a Startup View](#)
- [Setting Navigation Options](#)
- [Setting Transition Effects](#)
- [Setting Scroll Speeds](#)
- [Setting the Color for User Interface Elements](#)
- [Setting Quick Print Options](#)
- [Setting Outbound Communications Preferences for Send Email](#)
- [Setting Up Default Queries](#)
- [Viewing Saved Queries](#)
- [Changing Default Spell Check Options](#)
- [Customizing Aspects of Notifications](#)
- [Setting Up View Links for Screen Home Pages](#)
- [Showing, Hiding, and Reordering Screens or Views](#)
- [Customizing Aspects of the Calendar](#)
- [Maintaining Quick Fill Templates](#)
- [Setting Pause Behavior for Task UI](#)
- [About Setting Up Synchronization Preferences](#)
- [About Availability Fields in the Profile View](#)

About User Preferences

Your user preferences control the behavior and appearance of the Siebel application. The user preferences that you set apply to the user interface for only your session, and not to user interface for the sessions of other users. Your user preferences are stored in a Siebel repository patch file (SPF), and not in a table. This file has an extension of .spf. Each user for a Siebel application has a .spf file for that Siebel application.

Your access to the functionality in the User Preferences screen depends on how your Siebel application is configured. For more information, contact your Siebel administrator.

Some user preferences settings might not take effect until you log out, and then log back in to the Siebel application.

Setting a Default Time Zone

You can specify the time zone that your Siebel application uses to display date and time fields during your session.

To set a default time zone

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Profile.
The Profile form appears.
3. In the Time Zone field, click the select button.
The Pick Time Zone dialog box appears.
4. Select the time zone, and click OK.

Setting a Startup View

You can determine the screen and view that appears when you launch your Siebel application.

To set a startup view

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Behavior.
The Behavior form appears.
3. In the Startup View field, click the select button.
The Pick Favorite dialog box appears.
4. From the Startup View list in the Pick Favorite dialog box, select the screen and view you want as your startup view.

For example, choosing Accounts - Activities shows the Accounts screen, then Activities view when you first launch your Siebel application.

Note: The user preference startup views to appear at startup are visible in the drop-down list for the Startup View field only if the Category Viewbar Text and the Menu Text screen view properties are defined in Siebel Tools. If a view within a screen has neither of these properties defined, then the view does not appear in the list. For more information about setting the screen view properties, contact your Siebel administrator.

5. Click OK.

The screen and view you select appear in the Startup View field.

Setting Navigation Options

By default, the Siebel Open UI client uses the Side Menu icon as the navigation control. There are two other options available for navigation control settings: tab and tree. For more information about the Side Menu, see "[About the Side Menu](#)" on page 3-2.

If you select the tab format for navigation settings, the screen tabs and associated link bars appear near the top of your screen.

If you are left-handed, then you can set the names for the screen tabs and associated link bars to appear on the left side of the screen so that you can more easily access this information. In this scenario, these names appear in tree format and not in tab format and link bar format.

To set navigation options

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Behavior.
The Behavior form appears.
3. Select the desired value from the drop-down list for the Navigation Control field.

Setting Transition Effects

The Siebel Open UI client uses transition effects when you navigate between different screens and views. You can configure your preferred type of transition effect.

Note: Transition effects are limited in some deployments of the Siebel Open UI client. For more information about the transition effects available to you, contact your Siebel administrator.

To set the transition effects

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Behavior.
The Behavior form appears.
3. From the drop-down list for the Transition field, choose from the available options.

Setting Scroll Speeds

When tile applets appear in the Siebel Open UI client, scroll arrows appear on either side of the tiles. For example, tiles appear in the Contact List view of the Contacts screen after you click the Tile button. You can configure the scroll speed for tile applets. The scroll speed is the speed at which the tiles move when you click a scroll arrow.

Setting Scroll Speeds for All Tile Applets

You can set the scroll speeds for all tile applets.

To set the default scroll speed for all tile applets

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Behavior.
The Behavior form appears.
3. Select a value from the drop-down list for the Default Scroll Speed field.

Setting Scroll Speed for a Specific Tile Applet

You can set the Scroll speed for a specific tile applet. For a specific tile applet, the scroll speed that you set overrides the scroll speed that you set for all tile applets.

To set the scroll speed for a specific tile applet

1. Navigate to a view that displays a tile applet.
2. At the bottom right side of the tiles, adjust the slide bar to control the scroll speed.

Note: The number representing the scroll speed appears to the right of the slide bar.

The scroll speed is modified for the tile applet.

Setting the Color for User Interface Elements

You can designate the color that appears for the following elements in the user interface:

- Some active buttons.
- Link names in fields.
- Background colors.

To set the color for user interface elements

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Behavior.
The Behavior form appears.
3. Select color value from the drop-down list for the Theme field.

Note: You cannot select a value in the Theme field if the Navigation Control field has no value.

Setting Quick Print Options

The quick print function can use the print feature in your browser to print the records that currently appear in a list. For more information, see "[Printing Records](#)" on page 6-8.

To set quick print options

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Printing.
The Printing form appears.
3. Complete the fields as needed to set up printing the way you want it.
Some fields are described in the following table.

Field	Description
Application Menu - Print Behavior	Select from the following options to determine how screen data prints when you use the application-level menu (File, then Print): <ul style="list-style-type: none"> ■ All Applets in View. Prints each list or form sequentially, left to right and top to bottom. ■ Selected Applet Only. Prints only the selected list or form. This field applies only to HTML. If you use Microsoft Excel, only the list is printed.
Applet Menu - Print Behavior	Select from the following options to determine how screen data prints when you use the menu button (Menu, then Print): <ul style="list-style-type: none"> ■ All Applets in View. Prints each list or form sequentially, left to right and top to bottom. ■ Selected Applet Only. Prints only the selected list or form.
Print Individual Lists Using	Select from the following options: <ul style="list-style-type: none"> ■ Microsoft Excel. Prints only list applets. Select this option to designate Microsoft Excel as your quick print application. ■ HTML. Prints an entire view. Select this option to designate the print feature of the browser as your quick print application.
Rows to Print	Select from the following options to determine how you want rows to print: <ul style="list-style-type: none"> ■ All Rows in Current Query. ■ Active Row.
Columns to Print	Select from the following options to determine how you want columns to print: <ul style="list-style-type: none"> ■ All. ■ Visible Columns.

Setting Outbound Communications Preferences for Send Email

This topic describes how to set user preferences that affect the Send Email command. For more information about the sending email, see "[Sending Email from the Siebel Application](#)" on page 10-3. For information about supported versions of Microsoft Outlook and Lotus Notes email client software, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

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 Certification tab on My Oracle Support. For information about the Certification application, see article 1492194.1 (Article ID) on My Oracle Support.

To set outbound communications preferences for Send Email

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Outbound Communications.
The Outbound Communications form appears.
3. In the Send Email section, complete the fields as need.
Some fields are described in the following table.

Field	Description
Upon Sending Messages Generate	<p>Select activity generation for messages sent using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. Options are:</p> <ul style="list-style-type: none"> ■ No Activities. No activity records are generated by sending an outbound message. ■ Private activities. Sets the Internal flag to TRUE for an activity record generated by sending an outbound message. Only the message sender can view the activity record. ■ Public activities. Sets the Internal flag to FALSE for an activity record generated by sending an outbound message. Other users, in addition to the message sender, can view the activity record. <p>The specific results of the Internal flag of FALSE or TRUE depend on your Siebel implementation. For more information, contact your Siebel administrator.</p>
Default Profile	<p>Select the default communications profile to use for the Send Email and Send Fax commands. The profile stores various communications settings and provides access to the communications driver that transfers information between the Siebel application and the email/fax server. For example, a profile for the Internet SMTP/POP3 Server driver handles outbound communications using the SMTP protocol.</p> <p>You can access any profiles that are associated with your Siebel responsibility setting, and any profiles that you create for your personal use by using the My Profiles view in the Communications screen. The ability to create personal communications profiles is not available for some responsibility settings.</p> <p>The default profile information is copied to the From field in the Send Email and Send Fax dialog boxes. You can specify a different profile by choosing another value from the drop-down list for the From field.</p>
Default Recipient Class	<p>Select the default choice for where recipient email or fax address information is populated in an outbound message. Options are: To, Cc, and Bcc.</p> <p>In some contexts, the Send Email and Send Fax commands allow you to choose email or fax recipients from data stored in certain fields of the current record. This field applies if you choose a recipient for one of these current field values.</p> <p>For example, you might generally want to populate recipients to the To field. However, because of your typical activities or workflow and your company's business needs, it might be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.</p>

Field	Description
Email Client	Select the email client to use when the Send Email command is selected. Options are: Lotus Notes, Microsoft Outlook, Siebel Email Client, and External Email Client.
Siebel/Outlook Form	Select your preferred outbound email form when Email Client is set to Microsoft Outlook, if you prefer a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see <i>Siebel Email Administration Guide</i> .
Siebel/Lotus Form	Select your preferred outbound email form when Email Client is set to Lotus Notes, if you prefer a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see <i>Siebel Email Administration Guide</i> .
Default Message Format	Select the type of formatting to use for outbound email messages that are sent using the Send Email command. Options are HTML and Plain Text. For more information about using the HTML message format, see " Using the HTML Editor " on page 10-5.

Setting Up Default Queries

You can set up queries to display data when you access a specific screen and view. For more information about queries, see [Chapter 7, "Locating Information Using Query and iHelp."](#)

If you set up default queries for multiple views that are based on the same business object (for example, the Contact business object), then the default query for the first view that you access runs to display data in the view. However, when you access another one of the views, the data that appears is determined by the default query for the first view, and not the default query for the new view. The default query for the new view does not run to display data because the query context for the first view is retained when you navigate from the first view to any of the other views.

Note: Only views that you can access from the drop-down list for the Show field or from the Site Map can have an associated default query.

To set up a default query

- From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
- On the link bar, click Default Queries.
The Screen Name and Screen View lists appear.
- In the Screen Name list at the top of the screen, select the screen.
- In the Screen View list below the list of screens, select the view from the View Name column.
- Click the Default Query field next to the view you select, and click the select button.
The Pick Query dialog box appears.
- From the Pick Query dialog box, select the query you want this view to display, and click OK.

The selected query appears next to the appropriate view in the Default Query column.

Viewing Saved Queries

You can view existing queries that you previously saved. For more information about queries, see [Chapter 7, "Locating Information Using Query and iHelp."](#)

To view a saved query

1. From the application-level menu, choose Tools, then User Preferences.

The User Preferences screen appears.

2. On the link bar, click Saved Queries.

The Saved Queries list appears.

Changing Default Spell Check Options

You can change the options for the spell check feature. For example, you can change your default language for spell check. Also, you can add words to a custom dictionary. Custom user dictionaries are stored on the server so you can use any available workstation and still access the entire dictionary.

You can set up spell check to run automatically on email messages, faxes, pages, and outbound wireless messages that you send from the Siebel application. For more information about the spell check feature, see ["Spell Checking Fields in Records"](#) on page 6-13.

To change default spell check options

1. From the application-level menu, choose Tools, then User Preferences.

The User Preferences screen appears.

2. On the link bar, click Spelling.

The Spelling form appears.

3. In the Spelling form, complete the fields as needed.

Some fields are described in the following table.

Field	Description
Ignore UPPERCASE Words	Select this check box to indicate that spell check does not question words in all caps such as SMTP or CD.
Ignore MixedCase Words	Select this check box to indicate that spell check does not question words such as eMail.
Ignore Internet Names	Select this check box to indicate that spell check does not question words such as http://www.oracle.com/
Report Capitalization Errors	Select this check box to indicate that spell check questions capitalization errors such as PLEase.
Ignore HTML Tags	Select this check box to indicate that spell check does not question any text enclosed in angle brackets (<>) or any text that follows an unmatched left angle bracket (<).
Ignore Words with Digits	Select this check box to indicate that spell check does not question words such as POP3.

Field	Description
Always Check Spelling Before Sending	Select this check box to indicate that spell check automatically checks the spelling of the email message, fax, page, or outbound wireless message when you click Send.
Default Spell Checking Language	Select the current default language dictionary used to check spelling. The initial default language is the language specified during the Siebel application installation. You can change your default language at any time. A new default spell checking language takes effect the next time you invoke spell check.

Customizing Aspects of Notifications

If your Siebel administrator provides you with the proper authority, then you can customize notifications. You customize the behavior of the Notification icon and the notification panes. For more information, see "[About Notifications](#)" on page 3-17.

To customize notifications

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Message Broadcasting.
The Message Broadcasting form appears.
3. In the Message Broadcasting form, complete the fields as needed.
Some fields are described in the following table.

Field	Description
Scroll Speed	Select a speed at which messages scroll across the bottom of the application window. Values include: Stopped, Slow, Medium, or Fast. This field does not apply to the Siebel Open UI client.
Arrow Scroll Speed	Select a speed at which messages scroll when you click the arrows at either end of the message bar. Values include: Stopped, Slow, Medium, or Fast. This field does not apply to the Siebel Open UI client.
Mouseover Pause Speed	Select a speed at which the messages scroll when you place your cursor over the message bar. Values include: Stopped, Slow, Medium, or Fast. This field does not apply to the Siebel Open UI client.
Update Interval (Seconds)	Type the time interval in seconds at which you want notifications to refresh. This field applies to the Notification icon and notification panes.
Prefix of Normal Priority Message	Type the text to appear before a normal-priority message. For example, you might want the letter N to appear before a normal-priority message to indicate it is a normal-priority message. A letter is useful if you have difficulty distinguishing the colors of these messages. This field applies to the notification panes. For HTML messages, instead of entering <N>, enter <N> because the Siebel application does not recognize the less than character (<) and the greater than character (>).
Prefix of High Priority Message	Type the text to appear before a high-priority message. For example, you might want the letter H to appear before a high-priority message to indicate it is a high-priority message. A letter is useful if you have difficulty distinguishing the colors of these messages. This field applies to the notification panes. For HTML messages, instead of entering <H>, enter <H> because the Siebel application does not recognize the less than character (<) and the greater than character (>).

Field	Description
Prefix of Urgent Priority Message	Type the text to appear before an urgent-priority message. For example, you might want the letter U to appear before an urgent message to indicate it is an urgent message. A letter is useful if you have difficulty distinguishing the colors of these messages. This field applies to the notification panes. For HTML messages, instead of entering <U>, enter <U> because the Siebel application does not recognize the less than character (<) and the greater than character (>).
Show	Select this check box to show the functionality for notifications in the application window. This field applies to the Notification icon and notification panes.

Setting Up View Links for Screen Home Pages

You can set up view links to appear in the view links area in screen home pages. For more information about the main elements in home pages, see "[About Home Pages for Screens](#)" on page 3-5.

If your Siebel administrator sets up view links for screen home pages and marks those links as public, then you cannot change or delete those links.

To add a view link to a screen home page

- From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
- On the link bar, click View Links.
The Screen Homepages list appears.
- In the Screen Homepages list, select the home page for which you want to add a view link.
If view links exist for the home page, then the View Links list shows those links.
- In the View Links list, click New.
- Complete the fields as needed.
Some of the fields are described in the following table.

Field	Description
Sequence	Type a number that determines the place of the link in the view links area of the screen home page.
Public	Select this check box to indicate this link is a public view link and you cannot modify or delete it.
Active	Select this check box to indicate this link is an active view link.
Name	Type a name for the link.
Description	Type a long description for the link.
View	Select a view in the Pick Screen View dialog box that appears when you click the select button in this field.
Default Query	Select a default predefined query for the view you select in the View field.

Showing, Hiding, and Reordering Screens or Views

You can show, hide, and reorder screen tabs and view tabs. You can also set up default views for screens in your Siebel application. The screens and views available to you are always available through the Site Map, even if their tabs are hidden.

Showing or Hiding Screens

You can show or hide screen.

To show or hide screen

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Tab Layout.
The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the row for the screen you want to show or hide, and do one of the following:
 - Clear the Hide check box to show the screen.
 - Select the Hide check box to hide the screen.

Note: If you hide a screen, then all the views within that screen are also hidden.

Showing or Hiding Views

You can show or hide view.

To show or hide view tabs

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Tab Layout.
The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the row for the screen associated with the view you want to show or hide.
The View Tab Layout list shows the view for the selected screen.
4. In the View Tab Layout list, select the row for the view you want to show or hide, and do one of the following:
 - Clear the Hide check box to show the view.
 - Select the Hide check box to hide the view.

Changing the Order of Screen Tabs

You can change the order in which screens appear.

To change the order in which screens appear

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.

2. On the link bar, click Tab Layout.
The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, type a whole number in the Order field for each screen to define the position of that screen.
The number in the Order field is used to re-sequence the screens in ascending order. If you use the same number in the Order field for more than one screen, then the screen with the same number appear in alphabetical order.

Changing the Order of Views

You can change the order in which views appear.

To change the order in which views appear

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Tab Layout.
The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the row for the screen for which you want to reorder views.
The View Tab Layout list shows the views for the selected screen.
4. In the View Tab Layout list, type a whole number in the Order field for each view to define the position of that view.
The number in the Order field is used to re-sequence the vies in ascending order. If you use the same number in the Order field for more than one view, then the views with the same number appear in alphabetical order.

Setting Up Default Views for Screens

You can set up a default view for a screen.

To set up a default view for a screen

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Tab Layout.
The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the screen for which you want to set up a default view.
4. In the View Tab Layout list, select the Default View check box for the view you want as the default view for this screen.

Customizing Aspects of the Calendar

To better suit your needs, you can customize aspects of your calendar from the Calendar tab in the User Preferences screen. For information about using the calendar, see [Chapter 11, "Using the Calendar."](#)

This topic contains the following information:

- ["Customizing the Length of a Workday"](#) on page 13-13
- ["Setting Up Default Calendar Activity Duration"](#) on page 13-13
- ["Setting Up Email Prompts for Meetings"](#) on page 13-13
- ["Setting Up Default Calendar Formats"](#) on page 13-14
- ["Setting Up Another User's Calendar as Your Default Calendar"](#) on page 13-14
- ["Setting Up Default Participant Chart Display"](#) on page 13-15

Customizing the Length of a Workday

The calendar shows your default workday, but it might not reflect the hours you are actually at work. By default, your working hours for future dates are denoted by a yellow line that represents the beginning of your workday, and a red line that represents the end of your workday. You can change the start time and the end time of your workday.

Note: If you are viewing the current day, the yellow line will represent the current time, if the current time is later than the value specified in your Working Hours Start At preference setting. Otherwise, the yellow line will represent the value specified in your Working Hours Start At preference setting.

To change the start time and end time of your workday

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Calendar.
The Calendar form appears.
3. Enter the calendar start time in the Working Hours Start At field.
4. Enter the calendar end time in the Working Hours End At field.

Setting Up Default Calendar Activity Duration

Each activity you schedule on your calendar has a default duration. You can determine this default duration.

To set up a default calendar activity duration

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Calendar.
The Calendar form appears.
3. From the drop-down list for the Appointment Duration field, select the activity length.

Setting Up Email Prompts for Meetings

You might want to be prompted to send email messages to meeting participants when you create a new appointment or modify an existing appointment.

To set up an email prompt for a meeting

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Calendar.
The Calendar form appears.
3. Select the check box for the Participant Email Prompt field.

Setting Up Default Calendar Formats

You can set up a default calendar format to appear every time you access the Calendar screen. For example, if you use the monthly calendar all the time, then it helps you if the monthly calendar is set up as the default calendar format.

To set up a default calendar format

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Calendar.
The Calendar form appears.
3. From the drop-down list for the Default Calendar field, choose Daily, Weekly, or Monthly.
4. If you select Daily as the Default Calendar, then select the time interval for activity periods in the calendar from the drop-down list for the Time Interval (Minutes) field.
5. If you select Weekly as the Default Calendar, then do the following:
 1. Select the default weekly calendar format from the drop-down list for the Weekly Calendar View field.
 2. Select the time interval for activity periods in the calendar from the drop-down list for the Time Interval (Minutes) field.
 3. Select the first day of the week to appear in the calendar from the drop-down list for the First day of week field.
 4. Select the week days to appear in the calendar from the check boxes for each day of the week.
6. If you select Monthly as the Default Calendar, then select the first day of the week to appear in the calendar from the drop-down list for the First day of week field.

Setting Up Another User's Calendar as Your Default Calendar

If you spend much of your time accessing another user's calendar, then you might want to set up that user's calendar as your default calendar.

To set up another user's calendar as your default

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Calendar.
The Calendar form appears.

3. Click the select button in the Default User field.
The Pick Default User dialog box appears.
4. Select the appropriate user, and click OK.
That user's login appears in the Default User field, and that user's calendar appears as your default calendar in the Calendar screen.

Setting Up Default Participant Chart Display

In the Gantt chart in the Participant Availability subview, you can choose to display only your work hours or all 24 hours of the day.

To set up a default participant chart display

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Calendar.
The Calendar form appears.
3. From the drop-down list for the Participant Chart Display field, choose Working Hours or 24 Hours.

Maintaining Quick Fill Templates

After you create quick fill templates, you can change some of their properties, and you can deactivate or delete the templates. You can perform the tasks in this topic only for the quick fill templates that you create.

Renaming Quick Fill Templates

You can rename a quick fill template.

To rename a quick fill template

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Quick Fill Templates.
The Templates list appears.
3. Select the template you want to rename.
4. In the Template Name field, type a new name for the quick fill template.
5. (Optional) In the Description field, change the description of the template.

Deactivating Quick Fill Templates

You can deactivate a quick fill template.

To deactivate a quick fill template

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Quick Fill Templates.
The Templates list appears.

3. Select the template you want to deactivate.
4. In the Active field, clear the check box.

The template is no longer available for selection when you create a new record from a quick fill template.

Reactivating Quick Fill Templates

You can reactivate a quick fill template.

To reactivate a quick fill template

1. From the application-level menu, choose Tools, then User Preferences.

The User Preferences screen appears.

2. On the link bar, click Quick Fill Templates.

The Templates list appears.

3. Select the template you want to reactivate.

4. In the Active field, select the check box.

The template is now available for selection when you create a new record from a quick fill template.

Deleting Quick Fill Templates

You can permanently delete a quick fill template.

To permanently delete a quick fill template

1. From the application-level menu, choose Tools, then User Preferences.

The User Preferences screen appears.

2. On the link bar, click Quick Fill Templates.

The Templates list appears.

3. In the Templates list, select the quick fill template you want to delete, and click Delete.

4. At the confirmation dialog box, click OK.

Adding Quick Fill Template Options in an Applet Menu

In the preconfigured Siebel application, Quick Fill Template menu options are available for some applets such as Activity Form Applet and are not available for other applets, such as FS Invoice Form Applet. You can assign the Quick Fill Template menu options to other applets by adding Applet Method Menu Item objects.

To add Applet Method Menu Item objects to a quick fill template

1. In Siebel Tools, select the applet to which you want to add the quick fill template options.

2. Add a new Applet Method Menu Item to the applet.

The Applet Method Menu Item defines a menu item in the applet-level menu for the parent Applet object definition.

3. Add the following values:

Command: ApplyTemplate

Menu Text: Apply Template

Command: SaveTemplate

Menu Text: Save as Template

Command: NewFromTemplate

Menu Text: New From Template

Command: NewFromLastTemplate

Menu Text: New From Last Template

For more information about the Applet Method Menu Item, contact your Siebel administrator.

Setting Pause Behavior for Task UI

When you click the Pause button in the Task UI wizard, the task is saved in its current stage, and the task is sent to your Inbox. You can launch the task later and resume the task from where you left off. Complete the procedure in this topic to set this pause behavior.

To set the pause behavior for Task UI

1. From the application-level menu, choose Tools, then User Preferences.
The User Preferences screen appears.
2. On the link bar, click Behavior.
The Behavior form appears.
3. Select the check box for the Prompt to Pause When a User Interrupts a Task field.

About Setting Up Synchronization Preferences

You can set synchronization preferences from the DB Synchronization view of the User Preferences screen. These preferences include enabling auto synchronization, setting its frequency, and setting up auto synchronization reminders. For information about setting up synchronization preferences, see *Siebel Remote and Replication Manager Administration Guide*.

About Availability Fields in the Profile View

The following fields in the Availability section of the Profile view of the User Preferences screen are only informational and have no associated logic: Current Status, Until, and Next Status.

Using Keyboard Shortcuts

This chapter describes how to use keyboard shortcuts in the Siebel application. It includes the following topics:

- [Keyboard Shortcuts](#)
- [About Keyboard Shortcuts Tables](#)
- [Application Management Keyboard Shortcuts](#)
- [Online Help Keyboard Shortcuts](#)
- [General Navigation Keyboard Shortcuts](#)
- [Layout Management Keyboard Shortcuts](#)
- [Record Management Keyboard Shortcuts](#)
- [Record Navigation Keyboard Shortcuts](#)
- [Query Management Keyboard Shortcuts](#)
- [Field Management Keyboard Shortcuts](#)
- [Calendar Control Keyboard Shortcuts](#)
- [Calculator Control Keyboard Shortcuts](#)
- [Communication Management Keyboard Shortcuts](#)

Keyboard Shortcuts

Keyboard shortcuts allow you to use sequences of keystrokes as an alternative to the mouse for executing commands and navigating through the Siebel application. Typically these key sequences are combinations of CTRL, ALT, and SHIFT, along with the standard keys on your keyboard.

Many of the default keyboard shortcuts provided by your browser are also available for use in Siebel applications. For example, you can navigate sequentially through fields within the Siebel application views using TAB.

A full set of keyboard shortcuts is included in Siebel applications, but administrators can change these keyboard shortcuts in Siebel Tools. For information about the keyboard shortcuts available to you, contact your Siebel administrator.

About Keyboard Shortcuts Tables

The keyboard shortcuts in This chapter are organized in category tables according to the actions they perform. The context column indicates where in the Siebel application

you perform each action because keyboard shortcuts are based on Siebel application context, or focus rules. If a command is not available in the Siebel application, then the keyboard shortcut is not active.

Some keyboard shortcuts described in the tables in this topic do not execute the designated action in all browsers. Also, if a keyboard shortcut for an action in a table is the same keyboard shortcut for a different action in your browser, then the resulting action might be the action for your browser.

Note: The keyboard shortcuts described in this topic are included in the Siebel application. If your Siebel administrator changes the configuration of these keyboard shortcuts, then your keyboard shortcuts might be different. Because of the browser that you use, it might be necessary to change the default keyboard shortcuts in your browser preferences or in your Siebel Business Applications. If you encounter difficulties using your keyboard shortcuts, then contact your Siebel administrator.

Application Management Keyboard Shortcuts

Table 14–1 lists the keyboard shortcuts you can use to perform general activities in the Siebel application.

Table 14–1 Application Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Synchronize the database.	CTRL+ALT+5 SHIFT+F5	Application
Update the audit cache.	CTRL+ALT+X	Application
Connect as new mobile user.	CTRL+SHIFT+W	Application
Log out.	CTRL+SHIFT+X	Application

Online Help Keyboard Shortcuts

Table 14–2 lists the keyboard shortcuts you can use to access options available on the application-level Help menu.

Table 14–2 Online Help Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Display the online help.	CTRL+ALT+H CTRL+H	Screen
Display information about a record.	CTRL+ALT+K	Record
Display technical support information, including system information.	CTRL+ALT+J	Application

General Navigation Keyboard Shortcuts

Table 14–3 lists the keyboard shortcuts you can use to navigate in the Siebel application.

Table 14–3 General Navigation Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the Site Map.	CTRL+SHIFT+A	Application
Go to the application-level menu.	CTRL+ALT+M	Application
Go back.	ALT+LEFT ARROW	Application
Go forward.	ALT+RIGHT ARROW	Application
Go to the screen tabs.	CTRL+SHIFT+T	Application
Go to the view tabs.	CTRL+ALT+T	Application
Go to the subtabs.	CTRL+ALT+V	Application
Open the menu button window on a list or form.	CTRL+SHIFT+M CTRL+SHIFT+G	List, form
Go to the next list or form.	CTRL+SHIFT+] CTRL+ALT+]	Application
Go to the previous list or form.	CTRL+SHIFT+[CTRL+ALT+[Application
Open the Tasks pane.	CTRL+SHIFT+Y	Application
Go to the Computer Telephony Integration (CTI) toolbar.	SHIFT+F2	Application
Go to a tree applet.	CTRL+SHIFT+4	Application
Go to the previous tree applet node.	UP ARROW	Application
Go to the next tree applet node.	DOWN ARROW	Application
Go to the field for the visibility filter.	CTRL+SHIFT+V	Application

Layout Management Keyboard Shortcuts

[Table 14–4](#) lists the keyboard shortcuts you can use to change the appearance of lists in the Siebel application.

Table 14–4 Layout Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Sort a single column.	ENTER	List column header
Open a dialog box to perform advanced sorting.	CTRL+SHIFT+O	List

Table 14–4 (Cont.) Layout Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Open a dialog box to select the displayed columns.	CTRL+SHIFT+K	List
	CTRL+SHIFT+B	

Record Management Keyboard Shortcuts

Table 14–5 lists the keyboard shortcuts you can use when performing record management tasks.

Table 14–5 Record Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Create a new record.	CTRL+ALT+N	List, form
	CTRL+N	
Create a new record using a Quick Fill template.	CTRL+K	Form
Create a new record using the last used Quick Fill template.	CTRL+J	Form
Apply a Quick Fill template to a record.	CTRL+Q	Form
Copy a record.	CTRL+ALT+C	Record
	CTRL+B	
Save a record.	CTRL+SHIFT+S	List, form
	CTRL+S	
Delete a record.	CTRL+ALT+D	Record
	CTRL+D	
Undo a record.	CTRL+ALT+U	Record
	CTRL+U	
	ESC	
Select all records.	CTRL+ALT+A	List
	(The preceding shortcut applies when each record appears with a check box.)	
	CTRL+A	

Record Navigation Keyboard Shortcuts

Table 14–6 lists the keyboard shortcuts you can use to navigate to records in the Siebel application.

Table 14–6 Record Navigation Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the previous record.	CTRL+SHIFT+, (comma)	List, form
	CTRL+UP ARROW	
	ALT+, (comma)	

Table 14–6 (Cont.) Record Navigation Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the next record.	CTRL+SHIFT+. (period) CTRL+DOWN ARROW ALT+. (period)	List, form
Go to the previous record set.	CTRL+ALT+, (comma)	List
Go to the next record set.	CTRL+ALT+. (period)	List
Go to the first record set.	CTRL+ALT+F ALT+F	List, form
Go to the last record set.	CTRL+ALT+L ALT+L	List, form

Query Management Keyboard Shortcuts

Table 14–7 lists the keyboard shortcuts you can use to work with queries.

Table 14–7 Query Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Create a new query.	CTRL+ALT+Q ALT+Q	List, form
Run a query.	CTRL+ALT+ENTER ALT+ENTER CTRL+ENTER	List, form
Refine a query.	CTRL+ALT+R ALT+R ALT+G	List, form
Save a query with different name.	CTRL+ALT+S ALT+S	List, form
Open a dialog box for the query assistant.	CTRL+SHIFT+Z	List, form
Cancel a query.	CTRL+SHIFT+9	List, form

Field Management Keyboard Shortcuts

Table 14–8 lists the keyboard shortcuts you can use when performing field management tasks.

Table 14–8 Field Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Open a selection dialog box for a field.	CTRL+ALT+P	Field
Open the calendar control for a field.	F2	
Open the calculator control for a field.		
Close a selection dialog box for a field.	CTRL+ALT+O	Field

Table 14–8 (Cont.) Field Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Open a drop-down list for a field.	CTRL+ALT+P F2 DOWN ARROW	Field
Drill down on a field.	CTRL+SHIFT+SPACE	Field

Calendar Control Keyboard Shortcuts

Table 14–9 lists the keyboard shortcuts you can use to work with the calendar control.

Table 14–9 Calendar Control Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to widgets (interface elements) within the calendar control.	TAB TAB+SHIFT	Calendar control
Go to the previous day.	LEFT ARROW	Calendar control
Go to the next day.	RIGHT ARROW	Calendar control
Go to the same week day in the previous week.	UP ARROW	Calendar control
Go to the same week day in the next week.	DOWN ARROW	Calendar control
Go the first date in the displayed month.	HOME	Calendar control
Go to the last date in the displayed month.	END	Calendar control
Go to the same date in the previous month.	PAGE UP	Calendar control
Go to the same date in the next month.	PAGE DOWN	Calendar control
Go to the same date in the previous year.	ALT+PAGE UP	Calendar control
Go to the same date in the next year.	ALT+PAGE DOWN	Calendar control
Enter the selected date in the date field.	ENTER	Calendar control
Close the calendar control without saving data.	ESC	Calendar control

Calculator Control Keyboard Shortcuts

Table 14–10 lists the keyboard shortcuts you can use to work with the calculator control.

Table 14–10 Calculator Control Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Click the BS (Backspace) button.	BACKSPACE	Calculator control
Click the CE (Clear Entry) button.	HOME	Calculator control
Click the CA (Clear All) button.	END	Calculator control
Click the Use button.	ENTER	Calculator control
Click the Erase button.	DELETE	Calculator control
Close the calculator control without saving data.	ESC	Calculator control

Communication Management Keyboard Shortcuts

Table 14–11 lists the keyboard shortcuts you can use to share information with others.

Table 14–11 Communication Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the Correspondence screen to send a letter.	CTRL+SHIFT+L CTRL+L	Record
Open a dialog box to send an email.	CTRL+ALT+1 F9	Record
Open a dialog box to send a fax.	CTRL+ALT+2 CTRL+F9	Record
Open a dialog box to send a page.	CTRL+ALT+3 SHIFT+F9	Record
Open a dialog box to send an outbound wireless message.	CTRL+ALT+4 ALT+F9	Record

Accessibility for Siebel Business Applications

This appendix provides information about accessibility for Siebel Business Applications. It includes the following topics:

- [About Section 508 Accessibility](#)
- [About Web Content Accessibility Guidelines](#)
- [About the Voluntary Product Accessibility Template](#)
- [About Screen Readers](#)
- [About Utilities for Visually Impaired Users](#)
- [About Utilities for Physically Disabled Users](#)
- [About Keyboard Navigation in Accessible Rich Internet Applications](#)

About Section 508 Accessibility

In 1998, the United States Congress amended the Rehabilitation Act to require federal agencies to make their electronic and information technology accessible to people with disabilities. Inaccessible technology interferes with ability of these individuals to obtain and use information quickly and easily. Section 508 was enacted in the U.S. to eliminate barriers in information technology, to make available new opportunities for people with disabilities, and to encourage development of technologies that help achieve these goals. The Access Board, a U.S. government agency, developed accessibility standards for the various technologies that the law covers. These standards are folded into the procurement regulations for the federal government.

The law applies to all U.S. government agencies that develop, procure, maintain, or use electronic and information technology. Under Section 508, agencies must give disabled employees and members of the public access to information that is comparable to the access available to others.

Note: Section 508 undergoes review to address recent internet technology developments. You can review the laws and regulations to further your understanding about Section 508 and how you can support implementation.

For more information about Section 508, visit the Section 508 Web site at:

<http://www.section508.gov/>

For more information about the Access Board, visit the United States Access Board Web site at:

<http://www.access-board.gov/>

For information about Oracle's Accessibility Program, visit Oracle's Accessibility Program Web site at:

<http://www.oracle.com/accessibility>

About Web Content Accessibility Guidelines

The Web Content Accessibility Guidelines (WCAG) explain how to make Web content accessible to people with disabilities. Web content generally refers to the information in a Web page or Web application, including text, images, forms, and sounds. WCAG are part of a series of accessibility guidelines, including the Authoring Tool Accessibility Guidelines (ATAG) and the User Agent Accessibility Guidelines (UAAG). The Web Content Accessibility Guidelines Working Group (WCAGWG) developed WCAG technical documents. The WCAGWG is part of the Web Accessibility Initiative (WAI) for the World Wide Web Consortium (W3C).

Version 2.0 of the WCAG was approved in December of 2008. This version is stable, and it is the recommended version to use for reference. Version 2.0 of the WCAG is developed to do the following:

- To apply broadly to different technologies now and in the future
- To be easier to use and understand
- To be more precise when testing with automated testing tools and human evaluation

For information about Version 2.0 of WCAG, visit the Web Accessibility Initiative Web site at:

<http://www.w3.org/WAI/>

About the Voluntary Product Accessibility Template

The accessibility status of each Oracle product is reported in a Voluntary Product Accessibility Template (VPAT). The VPAT was created by a partnership of the Information Technology Industry Council (ITIC) and the U.S. General Services Administration (USGSA) to create a simple document that U.S. government contracting and procurement officials can use to evaluate a product with respect to the provisions in Section 508. The Siebel Open UI client has a VPAT. Administrators do not need to configure the Siebel Open UI client in order for people with disabilities to use the client.

Because products are on different release cycles, or because Oracle might have recently acquired products, not all Oracle products meet all of the guidelines.

For more information about VPAT, visit Oracle's Accessibility Program Web site at:

<http://www.oracle.com/accessibility>

About Screen Readers

The Siebel Open UI client supports screen readers that work in browser-based applications. Screen readers provide an audible description of the field contents as you navigate through the user interface. It is recommended that you use screen readers that comply with Accessible Rich Internet Applications (ARIA).

The Siebel Open UI client supports screen readers that are browser-compatible because it is a standards-based Web application. Some browsers interpret Accessible Rich Internet Applications (ARIA) and Version 2.0 of Web Content Accessibility Guidelines (WCAG) better than other browsers. Use the appropriate browser for your Siebel implementation. Consult with the vendor for your screen reader to use it with a Siebel application.

If you use a screen reader, then you hear the levels of the view bar region that denote user interface areas. This guide does not refer to the levels of the view bar region because the user interface that sighted users work with does not refer to these levels. [Table A-1](#) shows the level of the view bar region that corresponds to each user interface area that sighted users work with.

Table A-1 Levels of View Bar Region for User Interface Areas

User Interface Area	Level of View Bar Region
Screen tabs	First level
Link bar for a screen tab	Second level
View tabs	Third level
Link bar for a view tab	Fourth level

About Utilities for Visually Impaired Users

In the Siebel Open UI client, people with visual impairment can use screen magnification utilities to enlarge selected text and other on-screen elements for easier viewing. Several operating systems supply magnification utilities. Also, you can purchase these utilities from third-party vendors. The Siebel Open UI client supports magnification utilities that work in browser-based applications.

In the Siebel Open UI client, people with visual impairment can use zoom features and high-contrast options for browsers to facilitate viewing.

About Utilities for Physically Disabled Users

In the Siebel Open UI client, people with physical disabilities can use utilities, such as soft keyboards, voice control, and StickyKeys, to work with data. The keyboard-usage model for the Siebel Open UI client recognizes these utilities. For more information about using these utilities in browser-based applications, consult the vendor for the utility or the vendor for the operating system.

About Keyboard Navigation in Accessible Rich Internet Applications

The Siebel Open UI client supports Accessible Rich Internet Applications (ARIA). ARIA define a way to make Web content and Web applications more accessible for people with disabilities and easier to use for all users. ARIA especially help in navigating within dynamic content and in using advanced user interface controls developed with Ajax, HTML, JavaScript, and related technologies.

ARIA include a collection of common, semantic landmarks that apply to each navigable region in a Siebel application. These landmarks allow a person with disabilities to use an assistive-technology product, such a screen reader, to navigate in a Siebel application. Landmarks provide a consistent navigation experience in which a pointing device, such as a mouse, is unnecessary.

Examples of landmarks include: the application-level menu, the application toolbar, screen tabs, view tabs, lists, visibility filters, and forms. If you use a JAWS screen reader, you can press CTRL + INSERT+; (semicolon) to display a dialog box that describes the landmarks. For more information about using the keyboard to navigate in Oracle's Siebel Business Applications, see "[About Keyboard Navigation](#)" on page 3-2.

For information about ARIA, visit the Web Accessibility Initiative Web site at:
<http://www.w3.org/WAI/>

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