



# **Siebel Applications Administration Guide**

Siebel Innovation Pack 2016, Rev. A  
January 2017

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# 1

## What's New in This Release

### What's New in Siebel Applications Administration Guide, Siebel Innovation Pack 2016, Rev. A

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

**NOTE:** Siebel Innovation Pack 2016 is a continuation of the Siebel 8.1/8.2 release.

Table 1. New Product Features in Siebel Applications Administration Guide, Siebel Innovation Pack 2016, Rev. A

| Topic                                                                                   | Description                                                               |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| Configuring Action Buttons for Inbox Views                                              | Deleted topic. Removed the topic to align content with Siebel CX Open UI. |
| <a href="#">"Updating a Custom Hierarchy by Processing Deleted Records" on page 352</a> | Modified topic. Updated to reflect changes in UI.                         |

### What's New in Siebel Applications Administration Guide, Siebel Innovation Pack 2016

Table 2 lists the changes in this revision of the documentation to support this release of the software.

**NOTE:** Siebel Innovation Pack 2016 is a continuation of the Siebel 8.1/8.2 release.

Table 2. New Product Features in Siebel Applications Administration Guide, Siebel Innovation Pack 2016

| Topic                                                                                 | Description                                                                                                                                                                                                       |
|---------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Chapter 8, "Upload of UPT and UPT-IRM Intersect Data"</a>                 | New chapter. It includes information on how to upload to the Siebel database the usage pattern tracking (UPT) data and the data that is the result of intersection of UPT and incremental repository merge (IRM). |
| <a href="#">Chapter 9, "Analytical Reports for UPT and UPT with IRM Intersection"</a> | New chapter. It includes information about uploading and viewing UPT and UPT-IRM intersected data on OBIEE.                                                                                                       |
| "Notifications"                                                                       | Deleted chapter. This chapter is now moved to <i>Siebel Fundamentals</i> .                                                                                                                                        |

Table 2. New Product Features in Siebel Applications Administration Guide, Siebel Innovation Pack 2016

| Topic                                | Description                                                                       |
|--------------------------------------|-----------------------------------------------------------------------------------|
| "Signature Capture"                  | Deleted chapter. This chapter is now moved to <i>Configuring Siebel Open UI</i> . |
| "Target Account Selling" on page 417 | References to TAS Coach were removed as they are no longer applicable.            |

# 2

## Getting Started

This chapter includes information about getting started with Siebel Business Applications. It includes the following topics:

- [Requirements for Getting Started on page 21](#)
- [Starting the Siebel Application for the First Time on page 22](#)
- [About License Keys on page 23](#)
- [Selecting a Data Source on page 23](#)
- [About Seed Data on page 24](#)
- [Summary of Application Administration Tasks on page 24](#)

## Requirements for Getting Started

After you successfully install your Siebel Business Applications, you are ready to set up your Siebel Business Applications.

[Table 3](#) lists the software that you must correctly install before you can begin to use your Siebel Business Applications.

Table 3. Required Software

| Software                                    | More Information                                                        |
|---------------------------------------------|-------------------------------------------------------------------------|
| Siebel Gateway Name Server                  | <i>Siebel Installation Guide</i> for the operating system you are using |
| Siebel Server                               |                                                                         |
| Siebel Database Server                      |                                                                         |
| Siebel Tools or Siebel Developer Web Client |                                                                         |
| Siebel Business Applications                | Application-specific administration guide and this guide                |

After you successfully install these Siebel servers and applications, you can proceed to use them.

## Starting the Siebel Application for the First Time

To begin setting up your Siebel application, you must log in with administrative responsibilities. The Siebel database server installation script creates a Siebel administrator account that you can use to perform administrative tasks. The default user ID is SADMIN. A password is assigned to this user ID during the installation process. Your database administrator might also create a user ID and password that allows you to access the Siebel Server and perform the required setup. To set up entities in the Group Administration view, you must be connected to the Siebel Server; you do not have full administrative capabilities for this view if you are connected to the local database or working in a mobile Web client.

**NOTE:** You cannot modify the responsibility for the SADMIN ID that comes with Siebel Business Applications. However, you can copy this responsibility and modify the copy. For more information, see *Siebel Security Guide*.

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

### Using Siebel Developer Web Client

You can start a Siebel application from the Siebel Developer Web Client.

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

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

For information about the other databases available in the Connect to drop-down list, see ["Selecting a Data Source" on page 23](#).

### Using Siebel Web Client

You can also start a Siebel application from the Siebel Web Client.

#### *To start a Siebel application from the Siebel Web Client*

- 1 Open your Web browser.
- 2 Navigate to the URL for your Siebel Web Client.  
The login screen appears.
- 3 Enter SADMIN in the User ID field and the appropriate password in the Password field, and click OK.

## About License Keys

As of Siebel Innovation Pack 2014, you do not have to enter the license keys for Siebel CRM base applications. The license keys are provided in the seed data that is imported into a new Siebel database. For more information, see the topic about installing the Siebel Database in *Siebel Installation Guide* for the operating system you are using.

The license keys are also part of the seed data that is imported into an existing database as part of the Incremental Repository Merge or database upgrade operations. For more information about performing these operations, see *Siebel Database Upgrade Guide*.

## Selecting a Data Source

When you start a Siebel application from the Siebel Developer Web Client, you specify the data source to which you want to connect.

The following databases are potentially available to administrators and users:

- **Local.** A database that resides on your local computer. You can synchronize this database with the corporate database. This database is typically stored on a laptop computer, and mobile users who are not connected to a server when working use this database.
- **Server.** Your enterprise server database.
- **Sample.** A database of sample data, stored on your workstation. Using this database, you can experiment with a Siebel application without risk of damaging actual organizational data.

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

### About the Sample Database

Siebel Business Applications include a sample database to use in demonstrating, evaluating, or experimenting with the Siebel client and Siebel Tools. For more information, see *Siebel Installation Guide* for the operating system you are using.

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

You do not have to install server components to run the Siebel sample database. However, you cannot access the Administration - Server Management screen if the server component is not running. You cannot copy the sample database to the server data sources.

To log on as a demo user, double-click the icon for the listed Siebel application in the Siebel client program group. The Demo Siebel application automatically logs the indicated user into the sample database. For the other Siebel Business Applications, enter the user ID and password in the logon dialog box, and select Connect to: Sample.

The sample database that ships with the Siebel application has a built-in license key that includes access to all views and modules for a period of a year from the initial ship date of the product.

## About Seed Data

The enterprise database of your default Siebel application contains some built-in seed data, such as organization, division, position, responsibility, and employee records, as well as a list of countries for addresses. You can use this seed data for training or testing, or as templates for the real data that you enter. This seed data is only a starting point from which you can add more information as required. For more information about the seed data, including descriptions of seed data records, see *Siebel Security Guide*.

## Summary of Application Administration Tasks

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

Table 4. Application Administration Tasks

| If You Want to                                                                        | You Might Have to Perform                                                                                                                                                                                                                                                                                                  | More Information                                                                                                                                             |
|---------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use any Siebel CRM base application (for example, Siebel Sales or Siebel Call Center) | Initial Setup tasks.                                                                                                                                                                                                                                                                                                       | <a href="#">Chapter 3, "Initial Setup"</a>                                                                                                                   |
|                                                                                       | Ongoing administration tasks.                                                                                                                                                                                                                                                                                              | <a href="#">Chapter 4, "Ongoing Application Administration Tasks"</a>                                                                                        |
| Control access to views or data                                                       | <p>Tasks to establish a strategy for controlling access to views and data. These tasks include:</p> <ul style="list-style-type: none"> <li>■ Establish the business environment (such as organizations, divisions, and territories).</li> <li>■ Add employees.</li> <li>■ Assign responsibilities to employees.</li> </ul> | <i>Siebel Security Guide</i>                                                                                                                                 |
| Launch a global deployment                                                            | Locale and language administration tasks.                                                                                                                                                                                                                                                                                  | <p><a href="#">"Setting Up Locales" on page 30</a></p> <p><a href="#">"Setting Up Languages" on page 59</a></p> <p><i>Siebel Global Deployment Guide</i></p> |



Table 4. Application Administration Tasks

| If You Want to                                                                            | You Might Have to Perform                                                                                                                | More Information                                                                                   |
|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Manage global accounts                                                                    | Account administration tasks to set up global account hierarchies.                                                                       | <a href="#">Chapter 29, "Global Accounts"</a>                                                      |
| Use Application Services Interfaces (ASIs) for accounts, contacts, or households          | Tasks to set up Web services and activate workflows for the ASIs.                                                                        | <a href="#">Chapter 26, "Integration Using ASIs"</a>                                               |
| Create catalogs for data, including products                                              | Tasks to create catalogs for products, literature, solutions and auctions.                                                               | <i>Siebel Order Management Guide</i>                                                               |
| Use Correspondence, Presentations, and Proposals functionality                            | Tasks to set up the Siebel Document Server and create templates.                                                                         | <i>Siebel Correspondence, Proposals, and Presentations Guide</i>                                   |
| Use the calendar to set up resources, such as conference rooms, equipment, and projectors | Calendar administration tasks.                                                                                                           | <a href="#">Chapter 18, "Calendar"</a>                                                             |
| Use Assignment Manager to automatically assign tasks to appropriate users                 | Tasks to create skills and other criteria.                                                                                               | <i>Siebel Assignment Manager Administration Guide</i>                                              |
| Use Siebel Marketing                                                                      | Marketing administration tasks.                                                                                                          | <i>Siebel Marketing Installation and Administration Guide</i>                                      |
| Manage lists of prospects, contacts, accounts, positions, and employees                   | List Management tasks.                                                                                                                   | <i>Siebel Marketing User Guide</i> and <a href="#">Chapter 21, "Global Target List Management"</a> |
| Use Competency Management                                                                 | Skills and competencies administration tasks.<br><b>NOTE:</b> These skills are different skills than those that Assignment Manager uses. | <i>Siebel Project and Resource Management Administration Guide</i>                                 |
| Use Time Sheets and Expense Reports                                                       | Tasks for Time Sheet and Expense Report setup, such as creating work types.                                                              | <i>Siebel Project and Resource Management Administration Guide</i>                                 |

Table 4. Application Administration Tasks

| If You Want to                                           | You Might Have to Perform     | More Information                     |
|----------------------------------------------------------|-------------------------------|--------------------------------------|
| Manage Service schedules, Service Assets, and Warranties | Service administration tasks. | <i>Siebel Field Service Guide</i>    |
| Manage orders and the order process                      | Order administration tasks.   | <i>Siebel Order Management Guide</i> |

# 3

## Initial Setup

This chapter includes information about initial setup tasks. It includes the following topics:

- [About Initial Setup on page 27](#)
- [Process of Implementing Initial Setup on page 27](#)
- [Adding Views to the Siebel Application on page 28](#)
- [Completing Employee Setup on page 28](#)
- [Assigning Skills on page 30](#)
- [Setting Up Locales on page 30](#)
- [Setting Up Satmetrix Survey Reports on page 37](#)

### About Initial Setup

After you successfully install your Siebel Business Applications, you must perform numerous tasks to set up and administer them.

You must complete initial setup tasks in order for your Siebel Business Applications to work correctly, and then you can complete these tasks infrequently as your company grows. Complete ongoing tasks on an occasional or ongoing basis. [Chapter 4, “Ongoing Application Administration Tasks”](#) describes these ongoing tasks.

### Process of Implementing Initial Setup

To implement initial setup, perform the following tasks:

**1** Add any custom views.

Custom views are created in Siebel Tools and must be added to your Siebel application. Add custom views to the Views view before you define responsibilities. For information about adding views, see [“Adding Views to the Siebel Application” on page 28](#).

**2** Determine access control strategy and define business environment structure.

You can set up your Siebel Business Applications to support many strategies for your company to control access to views and data. These strategies include methods such as defining your business environment structure (organizations, internal and external divisions, and so on), defining employee positions, and creating access groups so that specific groups of people have access to specific views and data.

Make these decisions early in the deployment process, so that you can implement the strategy during the initial setup. For more information about controlling access to views and data, and the procedures for implementing access control, see *Siebel Security Guide*.

- 3 Enter employee records into the Siebel application and determine employee access to views and data.

Enter employee records after you have defined your business environment structure. You must assign at least one responsibility to each employee, and you can also assign organizations, positions, or other access control parameters. For more information about entering or deactivating employee records, see *Siebel Security Guide*.

- 4 Complete employee setup. For information about associating additional information to an employee record, see [“Completing Employee Setup” on page 28](#).
- 5 Assign employee skills. For more information, see [“Assigning Skills” on page 30](#).
- 6 Set up locales.

Locale Codes and parameters are necessary for a global deployment. For more information, see [“Setting Up Locales” on page 30](#).

## Adding Views to the Siebel Application

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

For example, you want to add an Opportunities view in the Reference screen. In Siebel Tools, you create the view and name it Reference Opportunities. In your Siebel application, you follow the steps in this topic, and add the Reference Opportunities view in the View Administration view. After it has been added in both places, the view can be made accessible to the appropriate users. For details on creating views, see *Configuring Siebel Business Applications*. For details about controlling visibility to views, see *Siebel Security Guide*.

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

**NOTE:** Only visibility-level views can be configured to appear in the Site Map.

This task is a step in [“Process of Implementing Initial Setup” on page 27](#).

### To add customized views to the Siebel application

- 1 Navigate to the Administration - Application screen, then the Views view.
- 2 In the Views list, create a new record, and complete the necessary fields.

## Completing Employee Setup

After completing the employee setup procedures, which are required to allow employee access to the Siebel application, views, and data, you complete employee setup by providing additional information. For information about the employee setup procedures, see *Siebel Security Guide*.

This setup can include the following:

- **Assignment Rules.** Allows you to see and administer the assignment rules for an employee. For more information about assignment rules, see *Siebel Assignment Manager Administration Guide*.  
**NOTE:** You must be logged on to a server database to use the Employee Assignment Rules view.
- **Availability.** Lists the projects for which an employee is on staff, or for which an employee has been requested. For more information, see *Siebel Project and Resource Management Administration Guide*.  
**NOTE:** Employees can also change their availability in the Availability view on the User Preferences screen.
- **Exception Hours.** Specifies the days and hours an employee is not available.
- **Utilization.** Displays a chart with the monthly and quarterly utilization of the currently selected employee. Managers use this chart for monitoring professional services projects and employees. For more information about professional services, see *Siebel Project and Resource Management Administration Guide*.
- **Tools.** Defines the tools that field service engineers carry with them or have access to. It allows a call center person to check whether the engineers have the correct tools for the jobs they are assigned to.
- **Job Information.** Specifies the job profile, salary, compensation ratio, pay currency, and location of employee.
- **Calendar administration.** Defines the calendar properties and access for an employee. For more information about Calendar administration, see [Chapter 18, "Calendar."](#)
- **Assignment Skills.** Defines an employee's skills and skill items, along with their level of expertise. Skills can be used as assignment criteria in Siebel Assignment Manager. For more information about how the Siebel application uses skills, see *Siebel Assignment Manager Administration Guide*.  
  
Skills can also be used in the Project and Resource Management product for managing resources. For information about these types of skills, see *Siebel Project and Resource Management Administration Guide*.
- **Employee Query.** Allows queries to identify employees with particular skills and expertise.
- **Service Details.** Provides details about the shift start and end locations, hourly costs, overtime availability and other details for a service employee.
- **Competency.** Provides a list of areas in which the employee has some demonstrated level of knowledge or accomplishment.
- **Education.** Provides details of an employee's education history.
- **Past Work Experience.** Provides details of an employee's work history.
- **Honor / Award.** Provides list of honors and awards earned by an employee.
- **Membership.** Provides details of an employee's memberships in various organizations.
- **Certification.** Provides details of an employee's certification.

This task is a step in ["Process of Implementing Initial Setup" on page 27](#).

**To complete the employee setup**

- 1 Navigate to the Administration - User screen, then the Employees view.
- 2 In the Employees list, drill down on Last Name field for an employee record.
- 3 Navigate to the More Info view.
- 4 In the form, complete the necessary fields.

Some of the fields are described in the following table.

| Field           | Comments                                                                                                                                                                                 |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Configuration   | Select the Siebel application or group of software components to associate with the currently selected employee. For more information, see <i>Siebel Anywhere Administration Guide</i> . |
| Available Until | Select a date and time to indicate the active period of an employee. This field is used in conjunction with the Availability, Overtime Availability, and Next Available fields.          |

- 5 Navigate to another appropriate view.
- 6 Create a new record, if needed, and complete the necessary fields.

## Assigning Skills

At the levels of organizations, positions, and employees, you can add skills. Skills are used for assigning employees to certain projects, service requests, and so on. Skills added to an organization apply to all employees assigned to that organization. Skills assigned to a position apply only to the employee assigned to that position. You create skills with Siebel Tools.

Employees can track and update their own skill profiles in the User Preferences Profile view. For more information about how your Siebel application uses skills, see *Siebel Assignment Manager Administration Guide*.

This task is a step in [“Process of Implementing Initial Setup” on page 27](#).

## Setting Up Locales

A locale is a set of rules guiding how common data appears to the user or is received from the user. These rules are used to format data from a Siebel database before displaying the resulting information in output fields on the user interface. Siebel Business Applications use local settings to support language and geographical conventions for the display language of drop-down lists, and formatting of data such as dates, times, numbers, and currencies.

The Locale information is stored in the Locale Table (S\_LOCALE). The data in this table is maintained by the administrator using the Locale Administration view. For more information about languages and locales, see *Siebel Global Deployment Guide*. For more information about configuring the formatting for dates and currency, see *Configuring Siebel Business Applications*.

The locale with which a Siebel Application Object Manager component is initialized is determined by the value of the parameter Locale Code. Although the locale is set during initial installation and configuration, it can be changed to any locale that is preconfigured with the Siebel application or that has been added by the administrator. The Locale Code parameter can be set at the Enterprise, Server, or Component level.

Several locale definitions come with the standard Siebel application. You can also revise these existing locales, or create new locales, using the Locale Administration view.

**NOTE:** Create a new locale only if a locale is not already defined that can meet your requirements.

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

**NOTE:** While the Siebel Web Clients use the locale settings specified in the Locale Administration view, the Siebel Mobile Web Client and the Siebel Developer Web Client use the locale settings defined in the Regional and Language Options settings on the client computer.

Setting up a Siebel Application Object Manager component includes assigning it a locale. Because the locale directs how locale-sensitive information such as dates, times, and numbers differs between countries, customers can configure a Siebel Application Object Manager for each country or other geographical setting in which they have users, and provide these users with data that appears correctly for their locale.

This task is a step in [“Process of Implementing Initial Setup” on page 27](#).

### To create a locale

- 1 Navigate to the Administration - Data screen, then the Locale view.
- 2 In the Locale list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Locale Code | <p>Type the locale code. Siebel Business Applications use the three-letter acronym conventions of Microsoft for the locale codes. In most cases, the acronym is created by taking the two-letter language abbreviation from ISO Standard 639 and adding a third letter to form a unique identifier.</p> <p>For example, ENU (English–United States), ENG (English–United Kingdom), or FRA (French–France)</p> <p>For information about Microsoft codes, see your Microsoft documentation.</p> |
| Locale Name | Type the locale name. The naming convention for locales is generally <i>Language Name–Territory</i> (for example, English–United States, English–United Kingdom, or French–France).                                                                                                                                                                                                                                                                                                           |

| Field                       | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description                 | Type optional text describing the locale.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| UI Directionality           | <p>Select a value for the direction of the text that appears in the user interface. Values are:</p> <ul style="list-style-type: none"> <li>■ Right To Left (Arabic and Hebrew)</li> <li>■ Left To Right (all other predefined locales)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| International Dialing Code  | <p>Select the country code to appear in phone numbers. This field suppresses the country code for phone numbers that are in the user's locale. For example, the phone numbers for two accounts are the following:</p> <ul style="list-style-type: none"> <li>■ +33 1-23 42 34 56, for an account based in France (+33 is the country code for France)</li> <li>■ +1 6502955000, for an account based in the U.S. (+1 is the country code for the U.S.)</li> </ul> <p>To a user based in the U.S. (locale ENU), the International Dialing Code value is "USA and Canada (1)", and the above phone numbers appear as follows:</p> <ul style="list-style-type: none"> <li>■ +33 1-23 42 34 56</li> <li>■ (650) 295-5000</li> </ul> |
| Positive Currency Format    | <p>Select a value for the location of the currency symbols with respect to the digits (100).</p> <p>For example, for U.S. format, \$32.45, select s100.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Negative Currency Format    | <p>Select a value for the location of the negative sign (-) with respect to the currency symbols and digits (100).</p> <p>Examples follow:</p> <ul style="list-style-type: none"> <li>■ For U.S. format, (\$32.45), select (s100).</li> <li>■ For British format, -£32.40, select -s100.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Currency Decimal Separator  | Type the symbol to indicate the decimal place in currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Currency Grouping Separator | Type the symbol to group numbers in currency. Use \B to designate a space.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Number Decimal Separator    | <p>Type the symbol to indicate the decimal place in numbers.</p> <p>Examples follow:</p> <ul style="list-style-type: none"> <li>■ For French format, 1 234,34 (comma as decimal symbol)</li> <li>■ For U.S. format, 1,234.34 (period as decimal symbol)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |



| Field                     | Comments                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Number Grouping Separator | <p>Type the symbol to group numbers.</p> <p>Examples follow:</p> <ul style="list-style-type: none"> <li>■ For French format, 1 234 (space as number grouping separator). Use \B to designate a space.</li> <li>■ For German format, 1.234 (period as number grouping separator)</li> <li>■ For U.S. format, 1,234 (comma as number grouping separator)</li> </ul> |
| Number Leading Zero       | Select the check box to display a leading zero in numbers less than one (for example, 0.7, not .7).                                                                                                                                                                                                                                                               |
| Number Fractional Digits  | <p>Type the number of digits after the decimal separator. For example, the number 12.340 has a number fractional of 3.</p> <p>This field applies to data fields of type DTYPE_NUMBER.</p>                                                                                                                                                                         |
| List Separator            | <p>Type the symbol to separate consecutive numbers in a list.</p> <p>In the U.S., consecutive numbers are separated by a comma (for example, 1.23,3.57,4.01),</p> <p>In France, consecutive numbers are separated by a semi-colon (for example, 1,23;3,57;4,01).</p>                                                                                              |

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Long Date Format | <p>Type the appropriate long date format, which typically contains day and month names. For example, the dddd, dd mmm, yyyy format yields a date such as Friday, 07 Jun, 2004.</p> <p>The following date format options represent the day of the month:</p> <ul style="list-style-type: none"> <li>■ <i>d</i> specifies the day of the month, with no leading 0 for single-digit days (1, 2, 3, ...).</li> <li>■ <i>dd</i> specifies the day of the month, with a leading 0 for single-digit days (01, 02, 03, ...).</li> <li>■ <i>ddd</i> specifies the abbreviated name of the day of the week (Mon, Tue, Wed, and so on).</li> <li>■ <i>dddd</i> specifies the full name of the day of the week (Monday, Tuesday, Wednesday, and so on).</li> </ul> <p>The following date format options represent the month:</p> <ul style="list-style-type: none"> <li>■ <i>m</i> specifies the month, with no leading 0 for single-digit months (1, 2, 3, ... 12).</li> <li>■ <i>mm</i> specifies the month, with a leading 0 for single-digit months (01, 02, 03, ... 12).</li> <li>■ <i>mmm</i> specifies the abbreviated month name (Jan, Feb, Mar, and so on).</li> <li>■ <i>mmm</i> specifies the full month name (January, February, March, and so on).</li> </ul> <p>The following date format options represent the year:</p> <ul style="list-style-type: none"> <li>■ <i>yy</i> specifies the last two digits of the year (00, 01, 02, ... 99).</li> <li>■ <i>yyyy</i> specifies the full four digits of the year (1999, 2000, 2001, ... 2099, ...).</li> </ul> <p>Date formats can include literal delimiter characters, such as a space, comma, period, hyphen, or forward slash (/). The Date Separator character is usually one of these characters. A delimiter can be any non-numeric character, but avoid using the date format options for the Long Date Format field in the delimiter.</p> |

| Field                           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Long Date Format<br>(continued) | <p>If you must use a date format option in a delimiter, then enclose the delimiter in single quotation marks. For example, a date of Thursday, January 24, 2013 in English is quinta-feira, 24 de janeiro de 2013 in Portuguese. The de delimiters (which mean “of”) in the Portuguese date include the letter d, which is a date format option for the day of the month. You specify the English date in a format of dddd, mmmm dd, yyyy. But you must specify the Portuguese date in a format of dddd, dd 'de' mmmm 'de' yyyy. You enclose the de delimiters in single quotation marks so that the letter d in these delimiters is not interpreted as the day of the month.</p> <p><b>NOTE:</b> Long dates are supported only for the calendar, the Gantt chart, salutation text on the home page, and balloon text in some charts.</p>                                                                                                                                                                                                                                                |
| Short Date Format               | <p>Type the appropriate shortened date format.</p> <p>Examples follow:</p> <ul style="list-style-type: none"> <li>■ yymmdd (081104 or 080321)</li> <li>■ m/dd/yyyy (11/04/2008 or 3/21/2008), the default U.S. format</li> <li>■ dd.mm.yyyy (04.11.2008 or 21.03.2008), the default German format</li> </ul> <p>For information about other elements used in date formats, see the description for the Long Date Format field.</p> <p>Date formats can include literal delimiter characters, such as a space, comma, period, hyphen, or forward slash (/). The Date Separator character is usually one of these characters. A delimiter can be any non-numeric character, but avoid using the date format options for the Long Date Format field in the delimiter.</p> <p><b>NOTE:</b> If you enter a month number greater than 12, then the month defaults to 12. If you enter a day number greater than the number of days in the month, then the day defaults to the last day of the month. For example, if you enter 42/99/03 (U.S. format), then the date defaults to 12/31/03.</p> |
| Date Separator                  | Type the symbol to use in a date format to separate the components of the date. It must be a single non-numeric character that is not one of the elements representing day, month, or year.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Time Separator                  | Type the symbol to separate hours from minutes in a time format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

| Field                | Comments                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time Leading Zero    | <p>Select the check box to display a leading zero in time fields.</p> <p>Examples follow:</p> <ul style="list-style-type: none"> <li>■ 01:03 AM, 01:03 PM, 12-hour clock with leading zero</li> <li>■ 1:03 AM, 1:03 PM, 12-hour clock without leading zero</li> <li>■ 01:03, 13:03, 24-hour clock with leading zero</li> <li>■ 1:03, 13:03, 24-hour clock without leading zero</li> </ul> |
| 24-hour clock        | Select the check box to indicate use of the 24-hour clock. Clear the check box to indicate use of the 12-hour clock.                                                                                                                                                                                                                                                                      |
| Time A.M. Designator | Type the symbol for designating time between 00:00 and 12:00 (for example, AM, a.m., or am).                                                                                                                                                                                                                                                                                              |
| Time P.M. Designator | Type the symbol for designating time between 12:00 and 24:00 (for example, PM, p.m., or pm).                                                                                                                                                                                                                                                                                              |

## Creating a Translation for a Locale Name

Complete the following procedure to create a translation for a locale name.

### To create a translation for a locale name

- 1 Navigate to the Administration - Data screen, then the Locale view.
- 2 In the Locale list, select the appropriate record.
- 3 Navigate to the Locale Name Translation view.
- 4 In the Locale Name Translation list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Language        | Type the language code of the translation of the locale name. For examples of language codes, see <i>Siebel Global Deployment Guide</i> .                                                                                                                                                                                                                                                                                             |
| Translated Name | <p>Type the exact translation of the locale name to appear in the drop-down list for users with the designated language code. For example, for the locale English–United States:</p> <ul style="list-style-type: none"> <li>■ For the locale with the language code ENU, the locale name is English–United States.</li> <li>■ For the locale with the language code ITA, the locale name is Inglese–Stati Uniti d'America.</li> </ul> |
| Description     | Type the translated description of this locale.                                                                                                                                                                                                                                                                                                                                                                                       |

## Editing the Current Locale

Complete the following procedure to edit the current locale.

### To edit the current locale

- 1 Edit the locale record.

For more information about access the locale record, see [“Setting Up Locales” on page 30](#).

- 2 To have the edits take effect, restart the Siebel Application Object Manager component.

For information about shutting down and starting Siebel Server components such as a Siebel Application Object Manager, see *Siebel System Administration Guide*.

## Setting Up Satmetrix Survey Reports

**NOTE:** This topic applies only to those who have purchased Siebel Satmetrix Surveys or who have purchased surveys directly from Satmetrix Systems.

To view Satmetrix survey reports through your Siebel application, you must:

- Add the Account Satmetrix Survey View view to the appropriate user responsibilities. For information about how to add views to responsibilities, see *Siebel Security Guide*.
- Enter the secret key string provided by Satmetrix Systems into the Satmetrix Key Value system preference. For information about how to change system preferences, see [“Setting System Preferences” on page 40](#).
- Complete the procedures in this topic.

## Extending the List of Values

Extend the List of Values for WI\_ARG\_TYPE. This LOV defines the arguments for integrating with other portal and internet applications. For more information about creating records for Lists of Values, see [Chapter 5, “Working with Lists of Values.”](#)

### To extend the List of Values for WI\_ARG\_TYPE

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Create a new record, and complete the fields, using the following table as a guide.

| Field                     | Value       |
|---------------------------|-------------|
| Type                      | WI_ARG_TYPE |
| Display Value             | Satmetrix   |
| Language-Independent Code | Satmetrix   |
| Active                    | Yes         |

| Field             | Value |
|-------------------|-------|
| Translate         | Yes   |
| Replication Level | All   |

## Setting Up the Symbolic URL

Next, set up the symbolic URL for access to the Satmetrix reports server. For more information about symbolic URLs, see *Siebel Portal Framework Guide*.

### To set up the symbolic URL for access to Satmetrix Reports

- 1 Navigate to the Administration - Integration screen, then the WI Symbolic URL List view.
- 2 From the visibility filter, select Symbolic URL Administration.
- 3 In the list of symbolic URLs, select SatmetrixSurvey.
- 4 Make sure the URL is the URL for the reports server provided by Satmetrix Systems.
- 5 In the Symbolic URL Arguments list, complete the fields, using the following table as a guide.

| Name        | Required Argument | Argument Type     | Argument Value                            | Append as Argument | Sequence |
|-------------|-------------------|-------------------|-------------------------------------------|--------------------|----------|
| EncodeUrl   | Yes               | Command           | FALSE                                     | Yes                | 1        |
| version     | Yes               | Constant          | <i>Obtain from Satmetrix</i>              | Yes                | 2        |
| windowSize  | Yes               | Command           | WebControl width=1000 height=500 border=1 | Yes                | 3        |
| type        | Yes               | Constant          | acct                                      | Yes                | 4        |
| acctid      | Yes               | Field             | Id                                        | Yes                | 5        |
| acctname    | Yes               | Field             | Name                                      | Yes                | 6        |
| contactid   | Yes               | Constant          | *                                         | Yes                | 7        |
| contactname | Yes               | Constant          | *                                         | Yes                | 8        |
| user        | Yes               | Profile Attribute | Login Name                                | Yes                | 9        |
| domain      | Yes               | Constant          | <i>Obtain from Satmetrix</i>              | Yes                | 10       |
| model       | Yes               | Constant          | <i>Obtain from Satmetrix</i>              | Yes                | 11       |
| created     | Yes               | Field             | Timestamp                                 | Yes                | 12       |
| token       | No                | Satmetrix         | Satmetrix Surveys, CalculateToken         | Yes                | 13       |

# 4

## Ongoing Application Administration Tasks

This chapter describes how to set up defaults that are used throughout your Siebel application. It includes the following topics:

- [About Setting Defaults in a Siebel Application on page 40](#)
- [Setting System Preferences on page 40](#)
- [Setting Up Predefined Queries on page 40](#)
- [Enabling Cancel Query on page 42](#)
- [Setting Up Currencies on page 43](#)
- [Setting Up Currency Conversion on page 45](#)
- [Setting Up Expense Types on page 48](#)
- [Setting Up Payment Terms on page 48](#)
- [Setting Up Periods on page 49](#)
- [Working with Telephone Formats on page 50](#)
- [Setting Up Pager Companies on page 55](#)
- [About Date Formats on page 55](#)
- [Setting Up ZIP Codes on page 55](#)
- [Administering Global Time Zone Support on page 56](#)
- [Setting Up Email, Fax, and Mail Accounts \(Contact Us\) on page 58](#)
- [Setting Up Industries on page 59](#)
- [Setting Up Languages on page 59](#)
- [About Case-Insensitive and Accent-Insensitive Queries and Searches on page 60](#)
- [Adding Additional Web Browsers on page 61](#)
- [Administering Quick Fill Templates on page 63](#)
- [Setting Up Default View Links for Screen Home Pages on page 64](#)

## About Setting Defaults in a Siebel Application

For some implementations, the default settings provided through the seed data meet a company's needs without customization. In other cases, administrators find it useful to make adjustments to these defaults.

**NOTE:** This chapter assumes that you have successfully installed your Siebel application and have completed the tasks for initial setup. For more information, see [Chapter 3, "Initial Setup."](#)

## Setting System Preferences

System preferences control how Siebel Business Applications operate in your environment. Review default settings and modify these settings as appropriate for your environment. For a list of the system preferences in Siebel Business Applications, see [Appendix 40, "System Preferences."](#)

Some system preferences might not take effect until the affected components are restarted. For information about shutting down and starting Siebel Server components such as a Siebel Application Object Manager, see *Siebel System Administration Guide*.

### To set system preferences

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Check that the default system preference values are correct in your environment.
- 3 Change values for system preferences as needed.

## Setting Up Predefined Queries

To set up predefined queries, review the following topics:

- ["About Setting Up Predefined Queries" on page 40](#)
- ["Guidelines for Setting Up Queries" on page 41](#)
- ["Creating Predefined Queries" on page 41](#)

### About Setting Up Predefined Queries

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

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

Set up predefined queries in the following ways:

- Create and execute a query in the usual way, and then save the query.



- Create or modify a predefined query in the Predefined Query screen.

## Guidelines for Setting Up Queries

When setting up queries, remember:

- The Administrator can define a PDQ using both displayed and nondisplayed fields.
- You can reference only fields from the current applet's business component in your query.
- On occasion, using the asterisk (\*) wildcard character to find all entries in a field can cause a performance problem. If you encounter a performance problem, then use IS NOT NULL instead. For more information about query operators, see *Siebel Fundamentals*.

Predefined queries are defined on a business object. All screens that are based on the same business object display all the predefined queries created for that business object.

- Querying on fields of data type DTYPE\_NOTE is not supported on some databases.

## Creating Predefined Queries

The following procedure describes how to create a predefined query by saving a query.

### *To create a predefined query by saving a query*

- 1 Navigate to the screen where you want to run the query.
- 2 Create and execute a query.
- 3 From the application-level menu, select Query, then Save Query As.
- 4 In the Save Query As dialog box, enter a name for the query.

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

- 5 If you want to make the query public, then perform the following steps:
  - a Navigate to the Administration - Application screen, then the Predefined Queries view.
  - b In the Predefined Queries list, deselect the Private field in the record for the query you just created.

## Setting Up Queries in the Predefined Query View

The following procedure describes how to set up a query in the Predefined Query view.

### *To set up a predefined query in the Predefined Query view*

- 1 Navigate to the Administration - Application screen, then the Predefined Queries view.

- 2 In the Predefined Queries list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Object       | Select the object on which the query is performed.                                                                                                                                                                                                                                                                                                                                                                                        |
| Name         | Type the name that appears in the predefined query drop-down list.                                                                                                                                                                                                                                                                                                                                                                        |
| Private      | <p>Select the check box to indicate the query is available only to the person who created it.</p> <p>When you clear the check box y to make a query public, the other users must first exit the Siebel application and reenter before they can see the newly public query.</p>                                                                                                                                                            |
| Query        | <p>Type the SQL code for the query.</p> <p>When you create a query for a field that is a multi-value group, you can use the EXISTS operator to query nonprimary child records. For more information about the syntax, see information about operators, expressions, and conditions in <i>Siebel Developer's Reference</i>.</p> <p><b>NOTE:</b> You cannot use SQL functions in the query for a predefined query.</p>                      |
| Cache Result | <p>Select the check box to indicate the query returns all rows up to the value of the DSMaxFetchArraySize parameter set for the data source. For information about setting DSMaxFetchArraySize, see information about modifying Named Subsystems in <i>Siebel System Administration Guide</i>.</p> <p><b>NOTE:</b> Setting DSMaxFetchArraySize to -1 and Cache Result to Y can cause memory problems for queries returning many rows.</p> |

## Enabling Cancel Query

The cancel query feature allows users to stop their slow or incorrect queries while using Siebel Web Client. If the query does not return records within a specific number of seconds (the timeout period), then a dialog box that allows the user to cancel the query appears.

The cancel query feature is enabled through the CancelQueryTimeout parameter. However, this parameter does not apply to search and find queries.

### To enable the cancel query feature

- 1 Navigate to Administration - Server Configuration, Enterprises, and then Component Definitions.
- 2 Query for Call Center Object Manager (ENU) and select it.
- 3 In Component Parameters, change the CancelQueryTimeout parameter to:

`CancelQueryTimeout = timeout`

where: *timeout* is any integer of zero or greater.

For example, if `CancelQueryTimeout` is 3, then the cancel query dialog box appears if records are not returned within 3 seconds.

**NOTE:** A timeout value of less than zero, for example, -1, disables the feature.

- 4 Restart the Siebel Server.

## Setting Up Currencies

You specify the currencies your company uses by:

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

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

### Making Currencies Active

The Siebel application includes more than 30 currency definitions. If your currency is one of these currencies, then mark it as active.

#### To make currencies active

- 1 Navigate to the Administration - Data screen, then the Currencies view.
- 2 For any currency that you want to make active, click the Active field in the Currencies list.
- 3 (Optional) Enter the Start Date and End Date in the form to specify the date when this currency is active and the date when it is no longer active.

### Defining Currencies

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

If you modify the definition of currencies, then you must clear the cache or log out and back in to the Siebel application before the modification becomes visible. For more information about clearing the cache, see ["Clearing the Cache" on page 68](#).

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

**To define a currency**

**1** Navigate to the Administration - Data screen, then the Currencies view.

**2** Create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                 | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Code                  | Type the three-letter code for the currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Name                  | Type the name of the currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Issuing Country       | Select the country that issues the currency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Symbol                | Type the symbol for the currency, such as \$.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Scale                 | Type the number of places after the decimal for displaying currency in the interface. For example, U.S. Dollars has a scale of 2 to accommodate the cents, so an amount appears as \$10.50. If the scale is 1, then this same amount appears as \$10.5.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Smallest Denomination | Type the smallest unit of currency available. For example, the smallest unit of currency for the U.S. Dollar is one cent, or .01 dollars. If there are no cents, then the scale is still 2, but the smallest denomination is \$0.05.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| EMU Triangulation     | Select the check box to indicate that this currency must be converted to other checked currencies using the EMU Triangulation method.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Active                | Select the check box to indicate the currency can be chosen by the user.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Start Date            | Select the date when the currency becomes active.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| End Date              | Select the date when the currency is no longer active.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Extended Scale        | <p>Type the number of places after the decimal for storing currency data in the Siebel database.</p> <p>The following values must be the same:</p> <ul style="list-style-type: none"> <li>■ The number of decimal places that the value in the Extended Scale field designates</li> <li>■ The number of decimal places that the value in the Scale field designates</li> <li>■ The number of decimal places after the decimal in the value in the Exchange Rate field (in the Exchange Rate view in the Currencies view of the Administration - Data screen)</li> </ul> <p>If these values are different, then results of currency calculations (for example, conversions or discounts) might be different than expected. Unexpected calculations result because the currency values that are stored in the Siebel database, and not the displayed values, are used for the calculations.</p> |

# Setting Up Currency Conversion

To set up exchange rates, review the following topics:

- [“Setting Up Exchange Rates” on page 45](#)
- [“The Euro and Triangulation” on page 46](#)
- [“Currency Conversion Functionality” on page 47](#)

## Setting Up Exchange Rates

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

If you fail to set up an exchange rate, then currency is converted on a one-to-one basis. Consequently, the amount stays the same, but the currency symbol changes.

**NOTE:** To calculate exchanges between currencies, you must set up an exchange rate twice. For example, if you want to calculate exchange rates between U.S. dollars and Japanese yen, then you must set up an exchange rate for yen to dollars, and set up another rate for dollars to yen.

### *To set up exchange rates*

- 1 Navigate to the Administration - Data screen, then the Currencies view.
- 2 In the Currencies list, select the currency for which you want to establish exchange rates.
- 3 Navigate to the Exchange Rates view.
- 4 In the Exchange Rates list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                                                                      |
|-------------|-----------------------------------------------------------------------------------------------|
| Type        | Select a value for the type of exchange rate. Currently, Daily is the only type used.         |
| To Currency | Select the currency to which you are converting the currency selected in the currencies list. |

| Field         | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exchange Rate | Type the conversion rate. If the number of places to the right of the decimal in this field does not match the value in the Extended Scale field and Scale field in the Currencies list, then the results of currency calculations might be different than expected.                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Exchange Date | <p>Select the date of this conversion rate. When converting currencies, Siebel Business Applications use the exchange rate date is closest to, but not past, the date of the transaction. Depending on the accuracy that you need and on how much currency values are fluctuating, you might want to enter a new exchange rate every week, month, quarter, or year.</p> <p>Siebel Business Applications use the Exchange Date only to convert currencies in transactions in which money is received. For example, Quote Item Price has an Exchange Date field, because it represents money that your company will receive, and your sales representatives enter the date when the money will be received.</p> |

**5** Repeat [Step 4](#) to add additional exchange rates.

You must restart the Siebel client or use the clear cache command before any changes to exchange rates can be seen in your Siebel application. For more information about clearing the cache, see [“Clearing the Cache” on page 68](#).

## The Euro and Triangulation

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

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

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

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

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

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

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

## Currency Conversion Functionality

Currency conversions currently occur in your Siebel application in various features. Some examples follow:

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

## ■ Forecast Analysis.

## Setting Up Expense Types

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

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

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

**NOTE:** Before you can add expense types and establishments, you must add them in the List of Values view of the Administration - Data screen so that they appear in the drop-down list. Create expense types under EXP\_ITEM\_TYPE, and create establishments under EXP\_ITEM\_ESTAB. For more details about administering Lists of Values, see [Chapter 5, "Working with Lists of Values."](#)

### To set up expense types

- 1 Navigate to the Expense Reports screen, then the Expense Types view.
- 2 Create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field           | Comments                                                                                                                                                |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expense Type    | Select a value for the expense type that the employee selects in the Expense Type drop-down list of expense report line items, such as <i>Airfare</i> . |
| Report Category | Select a category for this expense type. This category is used in summary reports, such as <i>Air/Rail Fare</i> .                                       |
| Summary         | Type a larger summary category for this expense type, such as <i>Travel Cost</i> . This summary category is used in summary reports.                    |

## Setting Up Payment Terms

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

### To set up a payment term

- 1 Navigate to the Administration - Data screen, Orders, and then the Payment Terms view.



- 2 Create a new record, and complete the necessary fields.

Some fields are described in the following table.

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

## Setting Up Periods

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

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

### *To set up periods*

- 1 Navigate to the Administration - Data screen, then the Periods view.
- 2 In the Period Definition list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

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

## Associating Period Units with a Period

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

### *To associate period units with a period*

- 1 Navigate to the Administration - Data screen, then the Periods view.
- 2 Select the appropriate period.
- 3 In the Period Units list, create a new record, select all the period units to associate with the period in the Period Units dialog box, and click OK.

## Working with Telephone Formats

Telephone formats specify how phone numbers are formatted when users enter the numbers in phone number fields. You can have only one phone format for each country code. The phone format is applied only when users enter numbers without other formatting symbols, such as a slash (/), or dash (-).

Before users enter phone numbers, perform the following tasks:

- Set the default locale. The default phone format is determined by the locale setting. For more information, see [“Setting Up Locales” on page 30](#).
- Define phone formats for countries that do not have a format already defined. For more information, see [“Specifying Phone Formats” on page 52](#).

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

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

**CAUTION:** If you modify the phone formats that are provided with your Siebel application, then make sure that you thoroughly test the changes.

### North American Phone Formats

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

- If the user enters 10 digits in a phone number field, then the number is formatted as (123) 123-1234.
- If the user enters more than 10 digits, then the first 10 digits are formatted as (123) 123-1234, and the rest of the digits are formatted as the extension number. The user can enter up to 40 digits.

- If the user enters fewer than 10 digits, then an error message appears.
- If the user begins the phone number with a zero (0), then an error message appears.

This formatting logic is followed even when the default locale is not North America.

## International Phone Formats

An international phone number is a phone number for a country other than the current default country.

To enter an international phone number in a phone number field, the user must enter a plus sign (+), followed by the country code. For example, the user can enter +44. If the user does not enter a country code, then the default country code is assumed.

When a user enters an international phone number in a phone number field, the formatting of the number depends on the following:

- The number of digits that the user enters
- The number of digits specified for the country in the phone format

Table 5 describes the formatting logic.

Table 5. Formatting Logic

| Number of Digits     | Formatting Details                                                                                    |
|----------------------|-------------------------------------------------------------------------------------------------------|
| Same as in format    | Formatted as specified.                                                                               |
| More than in format  | First digits are formatted as specified. The rest of the digits are formatted as an extension number. |
| Fewer than in format | Entry is accepted without an error message to accommodate phone numbers of different lengths.         |

If there is no phone format for the indicated country, then the number remains formatted in the same way that the user enters the number. No error message appears.

## Maximum Length for International Phone Numbers

Table 6 shows how to calculate the safe maximum length for international phone numbers.

Table 6. Maximum Length for International Phone Numbers

| Is there a phone format for the country? | Then, the safe maximum length for international phone number is |
|------------------------------------------|-----------------------------------------------------------------|
| Yes                                      | $C + 2N + E + 2 \leq 40$                                        |
| No                                       | $2C + 2N + E + 2 \leq 40$                                       |

In the formulae in this table:

- *C* is the length of the country code.
- *N* is the length of the city code and the subscriber number, including any formatting, such as spaces or hyphens.
- *E* is the length of the extension number.

An example calculation of the maximum length of an international phone number follows:

$$\underbrace{+834}_{C = 3} \underbrace{91\ 518-400}_{N = 10} \underbrace{x\ 123}_{E = 3}$$

## Specifying Phone Formats

If your users must enter phone numbers for countries for which a format has not been entered in your Siebel application, then you must specify phone formats for those countries.

**NOTE:** When you change or add a phone format, the existing phone numbers are not automatically updated.

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

### To specify phone formats

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Query the Type field for the entry PHONE\_FORMAT to see the existing phone formats.
- 3 Create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field         | Comments                                      |
|---------------|-----------------------------------------------|
| Type          | Select a value of PHONE_FORMAT.               |
| Display Value | Type the format string for the display value. |

| Field                     | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Language-Independent Code | <p>Type the language-independent code. Use the number zero (0) to represent required digits, the # character to represent optional digits, and other formatting characters to represent how to format the phone number. Do not include any alphanumeric characters other than zero. For example, to format an Australian phone number, which includes a two-digit area code and a six- or eight-digit number, use (00) 000# 000#.</p> <p>You do not have to include characters to represent the country code in the format. When a user enters a number, the country code is automatically shown if the default country is different from the country code.</p> |
| Order                     | Type the country code of the new format. When adding new codes, make sure that no country code is a prefix of any other. For example, because India's country code is 91, do not add a country code of 9 or of 910 (or any other number beginning with 91).                                                                                                                                                                                                                                                                                                                                                                                                     |

- 4 Restart the Siebel Server.

## Examples of Formatting of Phone Numbers

Table 7 shows how phone numbers appear under various circumstances. In this example, the default country is the United States. Therefore the default format is the North American format, (000) 000-0000. The 00-000-0000 format has been entered for country code 91.

Table 7. Examples of Phone Number Formatting

| User Enters    | Number Is Formatted As                                      |
|----------------|-------------------------------------------------------------|
| 1234567890     | (123) 456-7890                                              |
| 1234567890123  | (123) 456-7890 x123                                         |
| 123456         | The following error message: Invalid data has been entered. |
| +91123456789   | +9112-345-6789                                              |
| +9112345678910 | +9112-345-6789 x10                                          |
| +9112345       | +9112345                                                    |
| +2512345       | +2512345                                                    |
| ?0+9112345678  | ?0+9112345678 (you see the '?' and the '0')                 |
| ?0HelloWorld   | ?0HelloWorld (you see the '?' and the '0')                  |

## Sorting Phone Numbers

Phone numbers are stored in the Siebel database without special format characters, so the special format characters have no effect on the sort order.

## Querying Phone Numbers

When performing a query on a phone number, do not include any format characters such as commas (,), hyphens (-), periods (.), the letter x, or spaces.

You can query for only country 61 by typing `+61*` but you cannot query for only North American phone numbers this way, because `+1*` returns all phone numbers. To query for North American phone numbers, type the following: not like `+1*`.

When you use a phone number in a query, the country code of the default locale is automatically added to the query, unless the default locale is North America. If the default locale is North America, then no code is added. For example, if the default locale is Germany, and the user types 0181 in the phone field of a query, then the German country code (+49) is added to the query. The query becomes `+490181*`.

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

To see a demonstration of this behavior, look at the Contacts screen. Every phone number for a country other than the default contains `+n` at the beginning, while every phone number for the default country code appears as local (without a plus sign). Phone numbers that have the `+n` require explicit queries. The user must specify the country code and the number. Local numbers are returned normally.

Table 8 provides examples of how to query phone numbers.

Table 8. Phone Number Queries

| Query Result                               | Query Criteria                                     |
|--------------------------------------------|----------------------------------------------------|
| (123) 456-7890                             | 1234567890                                         |
| +61(123) 45.67.89 x0                       | +611234567890 (if 61 is defined as a country code) |
| Country code 61 phone numbers              | +61*                                               |
| All phone numbers                          | +1*                                                |
| All North American phone numbers           | not like +*                                        |
| 415 area code numbers (North America only) | 415*                                               |
| Null phone numbers                         | is null                                            |
| 415 area code or null (North America only) | 415* or is null                                    |
| (800) SKY-PAGE                             | 800SKY*                                            |

## Importing Information with EIM

Siebel Enterprise Integration Manager (EIM) manages the exchange of data between Siebel database tables and other corporate databases. When you use EIM to import information that includes international phone numbers, the numbers are handled as described in [“Working with Telephone Formats” on page 50](#). For more information about EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

## Updating the Phone Format with EAI Adapter

When you update the phone format using Siebel EAI Adapter, the plus (+) sign and the country code are required, but the phone format can be in any form (not only US format).

# Setting Up Pager Companies

Pager companies can be set up so they are available from the Pager Company field in the Send Page dialog.

### To set up a pager company

- 1 Navigate to the Administration - Communications screen, then the Pager Companies view.
- 2 In the Pager Companies list, create a new record, and complete the necessary fields.

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

## About Date Formats

For the Siebel Web Client, the display format for date and time is determined by the locale settings of the application server. For more information, see [“Setting Up Locales” on page 30](#).

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

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

## Setting Up ZIP Codes

ZIP Codes facilitate finding address attributes (City, State, and so on). They also facilitate using the street address to find nine-digit postal codes. Siebel Business Applications ship with a table of United States Postal Service ZIP Codes, and the table is available for customer use.

### To add a ZIP Code

- 1 Navigate to the Administration - Data screen, then the ZIP Code Administration view.
- 2 In the ZIP Geocodes list, create a new record, and complete the necessary fields.

## Administering Global Time Zone Support

The time zone records that are shipped as seed data with Siebel Business Applications include the world time zones, each with a start date of 1 January 1900. The world time zones that are available at the time of a Siebel release are included in the release.

Time zone detail records are included with time zone records. Time zone detail records are important for tracking minor differences in time zones. For example, there is a time zone detail record for each of the continental United States time zones with a start date of 1 January 2007, which reflects the changes in start and end dates for daylight savings time for 2007. If the daylight savings time start and end dates change again, then add a new record for the year of the change. For more information about global time zone support, see *Siebel Global Deployment Guide*.

Use the Time Zone administration view to:

- Edit the text descriptions of time zones and their abbreviations.
- Manage the active status of time zones to control which time zones are available to users for use in the Siebel Business Applications.
- Manage multilingual translations to control how time zone information appears to users in multiple languages.
- Set the start and end dates for daylight savings time for different years and zones.

Tasks for administering time zones include:

- [“Modifying Time Zones” on page 56](#)
- [“Maintaining Translations of Time Zones” on page 57](#)

### Modifying Time Zones

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

**NOTE:** You can add, but not delete time zones. Although you can inactivate time zones, do not do so when the time zones are in use because the inactivation might cause integration issues with Siebel CRM Desktop and Siebel Server Sync for Microsoft Exchange Server.

#### *To modify time zone settings*

- 1 Navigate to the Administration - Data screen, then the Time Zone Administration view.
- 2 In the Time Zone list, select the time zone record you want to modify.
- 3 Modify the fields as necessary.



- 4 In the Detail list, add or modify the records as necessary.

Some fields are described in the following table.

| Field                 | Comments                                                                                                                                                                                                             |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name                  | Type the name of time zone.                                                                                                                                                                                          |
| Standard Abbreviation | Type the abbreviation for the time zone.                                                                                                                                                                             |
| DST Abbreviation      | Type the abbreviations for daylight savings time (DST).                                                                                                                                                              |
| Start Date            | Select the date on which the offset rule becomes effective.                                                                                                                                                          |
| UTC Offset            | Type the number of minutes for the offset from Coordinated Universal Time (UTC) when DST is not in effect.                                                                                                           |
| DST Bias              | Type the number of minutes for the incremental DST offset from UTC when DST is not in effect.                                                                                                                        |
| DST Start Ordinal     | Select a value for the DST start ordinal. This field is part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , then <i>First</i> is defined in this field. |
| DST Start Day         | Select a value for the DST start day. This field is part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , then <i>Sunday</i> is defined in this field.    |
| DST Start Month       | Select a value for the DST start month. This field is part of the rule that determines when DST starts. For example, if the rule is <i>the first Sunday in April</i> , then <i>April</i> is defined in this field.   |
| DST Start Time        | Type the number of minutes after midnight that DST starts. For example, if DST starts at 2:00 A.M., then set the start time to 120.                                                                                  |

## Maintaining Translations of Time Zones

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

### To maintain translations of time zones

- 1 Navigate to the Administration - Data screen, then the Time Zone Administration view.
- 2 In the Time Zone list, select the time zone you want to translate.
- 3 In the Time Zone Translation list, create a new record, and complete the necessary fields, including the translation of the Name field for the selected language.
- 4 Repeat [Step 3](#) for each language required for translation.

## Date and Timestamps

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

If the Global Time Zone feature is enabled, then fields of data type UTCDATETIME are converted to UTC during operations for the Siebel Application Object Manager. For more information, see *Siebel Global Deployment Guide*.

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

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

## Creating a Contact Us Account

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

### To add a Contact Us account

- 1 Navigate to the Administration - Application screen, then the Contact Us view.
- 2 In the Email, Fax and Mail Accounts list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field        | Comments                                                  |
|--------------|-----------------------------------------------------------|
| Account Type | Displays Contact Us.                                      |
| Access List  | Select the employees who can view the Contact Us account. |

## About Adding Email Addresses and Subjects

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

## Setting Up Industries

You can set up and maintain industry information used throughout the Siebel application. The information in the Industries view populates the Industries drop-down list, which is found in a variety of screens and views, such as in the Accounts and References screens. The Industry list can also be used by Siebel Assignment Manager to assign new leads or service requests to Siebel users. For example, a sales representative who covers the pharmaceutical industry can be automatically assigned to new accounts using a *Pharmaceutical* Industry value.

### To add an industry

- 1 Navigate to the Administration - Data screen, then the Industries view.
- 2 In the Industries list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field    | Comments                                                                                                                                  |
|----------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Industry | Type the name of the industry. If you enter a value that already exists, then an error message appears.                                   |
| SIC Code | Type the Standard Industry Classification Code for the industry. If you enter a value that already exists, then an error message appears. |
| Type     | Select the type of industry.                                                                                                              |

## Setting Up Languages

You can set up and maintain language information used throughout the Siebel application. The information in the Languages view populates the Language drop-down list, which is found in a variety of screens and views, such as in the References and SmartScripts screens. The Language field can also be used by Siebel Assignment Manager to give assignments to call center agents who work for international companies and speak a variety of languages with customers.

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

**NOTE:** Languages cannot be deleted because deleting languages can cause problems with Mobile Web Client synchronization. Although the delete language command can be restored using Siebel Tools, this action is strongly discouraged. For help with modifying language code, create a service request (SR) on My Oracle Support. Alternatively, you can phone Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.

### To add a language

- 1 Navigate to the Administration - Data screen, then the Languages view.
- 2 In the Languages list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field | Comments                                                                                                 |
|-------|----------------------------------------------------------------------------------------------------------|
| Name  | Type the name of the language. If you enter a value that already exists, then an error message appears.  |
| Code  | Type the code for the language. If you enter a value that already exists, then an error message appears. |

## About Case-Insensitive and Accent-Insensitive Queries and Searches

By default, queries and searches in Siebel Business Applications are sensitive to case and accent. If you perform a query or search, then a match occurs only if the search criteria you enter are capitalized and accented in the same way that the data is capitalized and accented in the Siebel database. For information about how to implement CIAI queries and searches on particular columns or fields, see *Configuring Siebel Business Applications*. For information about how the CIAI feature affects performance, see *Siebel Performance Tuning Guide*.

If you do not want queries and searches to be case sensitive and accent sensitive, then you can enable case-insensitive and accent-insensitive (CIAI) queries and searches on particular columns and fields in Siebel Tools. If you enable CIAI queries on a column, then when you enter the query in the Siebel application, the field for the CIAI column is empty. When you enter the queries for fields that are not CIAI-enabled, <Case Required> text appears in the field.

Not all types of databases support both case-insensitive and accent-insensitive queries and searches on CIAI-enabled columns. [Table 9](#) lists the CIAI features that are supported in each type of database.

Table 9. Database Support for CIAI Queries

| Database | Case Insensitive | Accent Insensitive |
|----------|------------------|--------------------|
| DB2      | Yes              | No                 |
| MSSQL    | Yes              | Yes                |
| Oracle   | Yes              | No                 |

**NOTE:** Determine your requirements for case-insensitive queries and searches, and set the appropriate parameters for the fields before users enter any data.

**NOTE:** Search strings against the DB2 database must not be longer than the size of the column being searched.

## Forcing Case-Sensitive or CIAI Queries or Searches

Regardless of the setting for case-sensitive and accent-sensitive queries, users can use operators to force case-sensitive or CIAI queries or searches. [Table 10](#) describes the operators to use to force case-sensitive or CIAI queries or searches.

Table 10. Operators to Force Case-Sensitive or CIAI Queries or Searches

| Type of Query                       | Operator                                                     | Examples                                                                                                                                                                                                               |
|-------------------------------------|--------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Case sensitive and accent sensitive | = followed by the criterion in single quotation marks        | = 'Computer' returns only records that have Computer spelled with a capital C.                                                                                                                                         |
| CIAI                                | ~ followed by other operators if required, and the criterion | ~ LIKE computer returns all records that have computer in the field, regardless of capitalization.<br><br>~ LIKE francais returns all records that have francais in the field, regardless of capitalization or accent. |

In searches with complex criteria, the user must also use the tilde (~) operator to force the CIAI feature, regardless of the setting for case-sensitive and accent-sensitive queries and searches.

## Adding Additional Web Browsers

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

- **Add a parent browser definition.** This definition includes all of the browser capabilities. Use this method if you must add a completely new browser (such as Opera), or a major upgrade release of an existing browser (such as future releases of Microsoft Internet Explorer or Mozilla). For information about this procedure, see [“Adding a Web Browser” on page 62](#).
- **Add a child browser definition.** Child browser definitions inherit the capabilities of the parent browser, and add additional capabilities as necessary. Use this method for adding interim releases that are based on a browser that is already defined. For information about this procedure, see [“Adding a Web Browser” on page 62](#).

## Required Browser Capabilities

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

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

These capabilities are part of HTTP standard information and appear in HTTP request headers sent from a browser. For example, a request from an HTML5 browser sent to a Web application might include the following lines:

Accept: image/gif, image/x-xbitmap, image/jpeg, image/pjpeg, \*/\*

User-Agent: Mozilla/5.0

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

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

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

### Adding a Web Browser

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

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

#### *To add a parent Web browser*

- 1 Navigate to the Administration - Web Browser screen, then the Browsers view.
- 2 In the Browser list, create a new record, and complete the necessary fields.

**NOTE:** If there is an existing browser that contains most of the appropriate capabilities, then you can copy it, and make changes to it. To do so, click the cogwheel icon, and select Copy Record.

- 3 Drill down on the Name field for the record.
- 4 In the Capabilities list, create records for each of the capabilities of the browser.

### Adding a Child Web Browser

Complete the following procedure to add a child Web browser.

#### *To add a child Web browser*

- 1 Navigate to the Administration - Web Browser screen, then the Browsers view.
- 2 Note the name of the parent browser (the browser on which you base the new browser).
- 3 Create a new record, and complete the necessary fields.

- 4 Drill down on the Name field for record.
- 5 In the Capabilities list, create the following 3 records:
  - For the first record, select the Parent capability in the Add Capabilities dialog box, and enter the parent browser you identify in [Step 2](#) in the Capability Value field.
  - For the second record, select the User-Agent capability in the Add Capabilities dialog box, and enter the appropriate user-agent in the Capability Value field.
  - For the third record, select the Accept capability in the Add Capabilities dialog box, and enter the types of documents that the browser can open in the Capability Value field.
- 6 In the Capabilities list, add any additional capabilities that are not included in the parent browser or that differ from those inherited from the parent browser.

## Administering Quick Fill Templates

Users can create quick fill templates for their personal use. Administrators can make these templates public so that all users have access to them. For information about creating Quick Fill Templates, see *Siebel Fundamentals*.

### **To make a quick fill template public**

- 1 Navigate to the Administration - Application screen, then the Quick Fill Templates Administration view.
- 2 Select the template record.
- 3 Select the Public Flag field for the template.

### **Editing a Quick Fill Template**

Administrators can also delete any quick fill template and make simple changes to the template record (such as name, sequence, and public flag).

### **To edit a quick fill template**

- 1 Navigate to the Administration - Application screen, then the Quick Fill Templates Administration view.
- 2 Select the template record.
- 3 In the Details form, edit the fields as necessary.

The Sequence Number determines the order in which the fields are populated.

## Setting Up Default View Links for Screen Home Pages

Administrators can define links that appear on the quick links area of screen home pages. These default view links are visible to all users. For more information about screen home pages and setting up view links, see *Siebel Fundamentals*.

### **To add a default view link to a screen home page**

- 1 Navigate to the Administration - Application screen, then the View Links view.
- 2 In the Screen Homepages list, select the home page.
- 3 In the View Links list, create a new record, and complete the necessary fields.

Make sure that the view you specify is available to all users.

**TIP:** Use increments of 10 to sequence the links to provide users space to create their own view links between the default links that you create.



# 5

## Working with Lists of Values

This chapter provides guidelines to administrators for working with lists of values within Siebel Business Applications. It includes the following topics:

- [About Lists of Values on page 65](#)
- [Adding a New Value to an Existing List of Values on page 66](#)
- [Clearing the Cache on page 68](#)
- [List-of-Values Fields](#)
- [Modifying a List of Values on page 70](#)
- [Deactivating a Value in a List of Values](#)
- [Constrained Lists of Values on page 72](#)

### About Lists of Values

A list of values (LOV) is a set of values that populates the list when a user accesses a drop-down list in the user interface.

The following types of lists are available in a Siebel application:

- **Static drop-down lists.** A static drop-down list is a selection list with values that change only when administrators change them. An example of a static drop-down list is a list containing postal abbreviations for states and countries.
- **Dynamic lists.** A dynamic list is a selection list that usually contains transactional data. An example of a dynamic list is a list containing account names.

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

The remainder of this chapter focuses on static drop-down lists. You administer these lists from the views for lists of values. For information about how to set up a new list of values and configure both static drop-down lists and dynamic lists, see *Configuring Siebel Business Applications*.

This chapter describes how to work with the values that populate static drop-down lists, including how to create or modify values in an existing list of values, and deactivate values when you do not want them to appear. In addition, it describes how you can constrain lists of values through selections in other lists. For information about creating multilingual lists of values (MLOV), see *Configuring Siebel Business Applications*.

You can view data for lists of values in the following views of the Administration - Data screen:

- In the List of Values view, a list view
- In the LOV Explorer view

The values in these two views are the same. Only the format in which the information is presented is different. The procedures in this chapter give instructions that specify using the list view. You can also use the explorer view.

Your Siebel Business Applications come with numerous lists of values that support the static drop-down lists used in Siebel screens. You can use these lists of values as they are, or you can modify them to support your organization's requirements.

## Adding a New Value to an Existing List of Values

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

The maximum number of values allowed for one LOV type is 10,000.

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

- 1 Navigate to the screen displaying the drop-down list to which you want to add a value (for example, the Accounts screen).
- 2 Select the drop-down list and make note of one of the choices.  
  
For example, in the Accounts screen, select the Status drop-down list and make note of the value *Gold*.  
  
**TIP:** Be sure to note the capitalization and spacing of the choice.
- 3 Navigate to the Administration - Data screen, then the List of Values view.
- 4 In the list-of-values list, perform a query in the Display Value field, using the value you note in [Step 2](#).
- 5 In the list of records that is returned, identify the appropriate record by reviewing the entries in the Type field.

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

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

## Adding the New Value

Complete the following procedure to add a new value to an existing list of values.

**To add a new value to an existing list of values**

**1** Navigate to the Administration - Data screen, then the List of Values view.

**2** Create a new record, and complete the necessary fields.

Some of the fields are described in the following table.

| Field                     | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type                      | Select a type for the list of values. For example, select ACCOUNT_STATUS.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Display Value             | <p>Type the new value for the list of values.</p> <p>For example, if Bronze is the status that your organization gives to customers who have a reliable account rating, and you want to make Bronze available as in the Account Status drop-down, then enter Bronze as the display value.</p> <p>Make sure that the length of the display value you enter does not exceed the allowed length of the destination column.</p>                                                                                                                                                                                                                                                                                                                                                                           |
| Language Independent Code | <p>Type the Language Independent Code for the list of values. This value is usually the same as the value in the Display Value field.</p> <p>Make sure that the length of the Language Independent Code you enter does not exceed the allowed length of the destination column.</p> <p><b>NOTE:</b> The Display Name field and Language Independent Code field must both be unique within a list-of-values type, except when configuring a multilingual list of values. If you add a value that already exists, then an error message appears. For example, there cannot be two ACCOUNT_STATUS records that have a display value of Bronze. For information about multilingual lists of values, see the definition of the Language Independent Code field in <a href="#">Table 11 on page 69</a>.</p> |
| Order                     | <p>Type a number to indicate the numerical order in which the value appears in a drop-down list.</p> <p>For example, if the order numbers for Gold and Silver are 1 and 2, respectively, then the order number for Bronze is 3.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

**3** If appropriate, complete the remaining fields in the record.

For a description of these fields, see [“List-of-Values Fields” on page 68](#).

**4** Clear the LOV cache by clicking Clear Cache.

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

## Clearing the Cache

A particular list of values is cached the first time a user opens a drop-down list that uses the list of values. This feature improves performance by avoiding having to retrieve the list from the Siebel database when subsequently using of the drop-down list. However, this feature also means that updates to a list of values do not appear in a drop-down list until you clear the cache. Clearing the cache instructs the Siebel application to read the updated values out of the Siebel database and display them.

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

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

### About LOV Caching on Screen Home Pages

LOV caching behaves slightly differently on screen home pages.

On screen home pages, the LOVs are cached when the home page appears. It is not necessary for the user to open the drop-down list to have the LOVs cached.

### Clearing the Cache

You can use the Clear Cache button to clear the cache.

#### *To clear the cache using the Clear Cache button*

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 In the List of Values list, click Clear Cache.

## List-of-Values Fields

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

If you must use the High or Low fields, or other extra fields, then use Siebel Tools to extend the PickList Generic BusComp by adding fields mapped to the corresponding columns on the S\_LST\_OF\_VAL table. For example, you can use the High and Low fields to automatically populate the high and low temperatures when a user picks a Month value in a Date drop-down list. To do so, you add two pick maps to the Month field by adding the High and Low list-of-value fields to the Pick List field of Pick Map. For more information about the PickList Generic BusComp, and about configuring static drop-down lists and pick maps, see *Configuring Siebel Business Applications*.

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

Table 11 shows the fields for List-of-Values records. Not all fields for list-of-values records appear in the standard user interface. You can use the Columns Displayed option in the menu for the cogwheel icon to display a field that does not appear.

Table 11. List-of-Values Fields

| Field                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type                      | The type of list of values (the field name).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Display Value             | The value appears in the drop-down list.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Translate                 | A check box that, when checked, indicates that internationalization is needed. (No client or server functionality is associated with this field.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Multilingual              | A check box that, when checked, indicates that the list of values is part of a multilingual list of values (MLOV). (No client or server functionality is associated with this field.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Language Independent Code | <p>A value that, along with the Display Value, uniquely identifies a value for a particular LOV type. In most cases the Language Independent Code is the same as the Display Value. However, the Language Independent Code and Display Value are different for multilingual lists of values (MLOVs). MLOVs allow a single logical list item to support multiple display values for users who are accessing the Siebel application in different languages.</p> <p>For example if the MR_MS (Personal Title) list of values were multilingual, then there might be three list-of-values items with a Language Independent Code of Mr. These lists of values might have a display value and language of Mr. (English-American), Senor (Spanish - Modern), and Herr (German), respectively. German users see Herr in the Personal Title drop-down list, Spanish users see Senor and English users see Mr. Although the display values vary across language instances, the value stored in the Siebel database when a user selects any one of these values is always Mr. because that is the Language Independent Code associated with Herr, Senor, and Mr.</p> <p>Values entered in the Language Independent Code field are sometimes referred to as LIVs (language independent values).</p> |

Table 11. List-of-Values Fields

| Field             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Parent LIC        | <p>The Language Independent Code of a parent list of values. This field is used in hierarchical lists of values, where the values that appear in a drop-down list are constrained by the value selected in the parent drop-down list of values. For more information, see <a href="#">“Constrained Lists of Values” on page 72</a>.</p> <p>There are only parents and children in this hierarchy. Grandchildren are not allowed. This hierarchy is enforced by limiting the values in the Pick Parent dialog box to those values that do not themselves have parent display values.</p> |
| Replication Level | A value that specifies whether the translation is intended for use at all levels in the translation hierarchy or only at the regional level.                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| High              | An extra field available for use by pick maps or for customization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Low               | An extra field available for use by pick maps or for customization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Order             | The numerical order in which a value appears within a drop-down list.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Active            | A check box that, when checked, indicates that the value appears to the user, and that when unchecked, indicates that the value does not appear to the user.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Language Name     | The language used for the Display Value field in the list of values.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Target Low        | An extra field used in Smart Reports.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Target High       | An extra field used in Smart Reports.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Weighting Factor  | An extra field available for use by pick maps or for customization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Bitmap            | The bitmap file that appears.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Description       | A description of a specific value.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Modifying a List of Values

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

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

- Do not change the Language Independent Code values for lists of values because the internal Siebel application uses the Language Independent Code field.
- Some lists of values are for use only by the internal Siebel application. Do not modify these lists of values. For example, the list-of-values SOURCE\_TYPE (Internal) and list-of-values types that begin with REPOSITORY, WFR, or WF in the Type field name are for internal use only.

- Some list-of-values modifications can have unwanted results. For example, changing all lists of values in the Siebel application to uppercase or changing the Language Independent Code from the Siebel standard can result in values not appearing or appearing improperly.

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

To modify a value in a drop-down list, you must know its display value and type. You can find out the type by querying the list-of-values list for a specific display value. For example, if you must make a change to the value *1-ASAP* in the Priority drop-down list in the Activities screen, then you can do so using the following steps. For more information about multilingual lists of values (MLOVs), see *Configuring Siebel Business Applications*.

### To modify an item in a list of values

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Perform a query to locate the record you want to change.

For example, you might query for a value of *1-ASAP* in the Display Value field. In this example, a list of records appears that includes the display value that you enter. Multiple records can appear, and the records can have different types.

- 3 In the list of records, select the record that you want to modify, and change the record.
- 4 To see the list-of-values modification in the Siebel application, click Clear Cache.

For instructions about how to clear the cache, see ["Clearing the Cache" on page 68](#).

## Deactivating a Value in a List of Values

You can deactivate individual values in a list. Inactive values do not appear to users in a drop-down list, and active values appear to users. Inactive values are not deleted. To delete values, the No Delete property in the List Of Values business component must be FALSE.

**CAUTION:** Deactivating some lists of values can adversely impact standard Siebel functionality. Be careful when deactivating a list of values because the Siebel application might depend on the list of values.

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

Be careful when deactivating values. For example, if you deactivate the value *Commercial* in the *Account\_Type* list of values, but account data with an Account Type of *Commercial* exists, then you might introduce inconsistencies in your data. If you want to deactivate a value, then first clean up the account records in the Siebel database.

**To deactivate a value in a list of values**

- 1** Navigate to the Administration - Data screen, then the List of Values view.
- 2** If necessary, perform a query to locate the record that you want to deactivate.
- 3** Select the record that you want to deactivate.
- 4** In the Active field, click the check mark to clear the field.
- 5** Click Clear Cache.

You can navigate to the list of values to see that the value no longer appears.

## Constrained Lists of Values

Some drop-down lists are set up to display a subset of values that are based on a value set in another drop-down list. For example, if you have two fields for Service Request, *Area* and *Subarea*, then the values shown in the *Area* drop-down list might include *Network* and *Upgrade*. If the user selects *Network*, then that user might see a drop-down list for *Subarea* that includes *Ethernet Card* and *3rd Party Software*. If the user selects *Upgrade* for the *Area*, then that user might see *CD-ROM*, *Disk Drive*, *Memory*, and *Operating System* in the *Subarea*. This type of filtering is a *constrained drop-down list*. In such a case, the lists of values are configured to depend on each other. In this example, the *Area* drop-down list is the parent, and the *Subarea* drop-down list is the child. For information about constraining both static drop-down lists (maintained through lists of values) and dynamic lists, see *Configuring Siebel Business Applications*.

Constrained drop-down lists (or lists of values) must first be set up through Siebel Tools. After they are configured through Siebel Tools, specific values in lists can be made hierarchically dependent through the List of Values view. You use the Parent LIC field in the list-of-values record to specify the values that appear when a value is selected in the parent drop-down list.

For example, the LOV Type SR\_AREA is used by both the *Area* and *Subarea* drop-down lists in a Service Request. The values that appear in the *Area* drop-down list are constrained to those that have a Parent LIC value of External.

The values that appear in the *Subarea* drop-down list are constrained to those that have a Parent LIC value that matches the user's selection for the *Area*. For example, if the user selects *Network* in the *Area* drop-down, then only those values that have the Parent LIC field set to *Network* appear in the *Subarea* drop-down list, while if the user selects *Upgrade* in the *Area* drop-down, then only those values that have the Parent LIC field set to *Upgrade* appear in the *Subarea* drop-down list.

If you want to change the parent *Area* of a *Subarea* list item, then you must modify the Parent LIC field of the *Subarea* list item. Similarly, to add a new *Subarea* list item, you must create a new record, setting the list-of-values type to SR\_AREA and the Display Value, Language Independent Code, and Language as described in ["Adding a New Value to an Existing List of Values" on page 66](#).

Then you set the Parent LIC field to the appropriate parent area. By contrast, to add a new item to the *Area* drop-down list, you follow the same steps, but specify that the Parent LIC field have the value *External*.

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



SR\_AREA LOV is used by the SR\_TYPE, Area, and Sub Area LOVs in a Parent-Child-Grandchild hierarchy. SR\_AREA LOV configuration is different when compared with other LOVs. While creating SR\_AREA LOV values make sure that:

- SR Type value has no Parent LIC field and the order number is 1000 or more.
- SR Area LOV value's Parent LIC field is the LIC of the parent SR Type.
- Sub Area's Parent LIC field is a combination of the SR TYPE and SR Area LIC Values. The SR Type and SR Area LIC values are concatenated to create a new record that appears in the Parent LIC list.

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



# 6

## Siebel Audit Trail

This chapter includes information about Siebel Audit Trail. It includes the following topics:

- [About Siebel Audit Trail on page 75](#)
- [Process of Configuring and Using Siebel Audit Trail on page 78](#)
- [Enabling and Disabling Siebel Audit Trail on page 78](#)
- [Specifying Business Components and Business Component Fields for Audit on page 79](#)
- [Setting Up Read Auditing on page 81](#)
- [Specifying Parent–Child Associations for Audit on page 81](#)
- [Specifying Siebel Audit Trail Restrictions on page 82](#)
- [Verifying Siebel Audit Trail Configuration on page 83](#)
- [Viewing Audit Trail Records on page 83](#)
- [Linking Siebel Audit Trail to a Business Component on page 86](#)
- [Decoding the Audit Log File on page 86](#)
- [Importing Siebel Audit Trail with Enterprise Integration Manager on page 91](#)
- [Customizing Siebel Audit Trail on page 91](#)

### About Siebel Audit Trail

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

Siebel Audit Trail can be used for a variety of purposes. In a simple example, a call center uses an audit trail to track the status change of a service request, who changed it and when. Siebel Audit Trail capabilities can also be used to track the time needed to change the state of an item, such as a service request from open to closed. A calculation of the time difference can help the call center manager measure and improve service quality. Siebel Audit Trail can also be used to reproduce a record at a specific point in time to maintain regulatory compliance. You look at the audit trail for the record and compare the audit trail details with the current state of the record.

Siebel Audit Trail can also be used to track the viewing and export of data. For example, financial services organizations can use Siebel Audit Trail to monitor who has read or exported an account holder's information. Siebel Audit Trail can be implemented for the Siebel Audit Trail functionality itself to help you track any changes made to the Siebel Audit Trail settings.

**NOTE:** For any Siebel Audit Trail deployment, the combination of the number of fields audited and the number of audit records created by a business process has performance implications. If you audit a large number of fields on a business component, or audit fields in a large number of business components, then unacceptable performance might result. Because read operations are common, if you audit a large number of these operations, then unacceptable performance might result.

## Siebel Audit Trail Features

More Siebel Audit Trail features are described in the following topics:

- [“Audit Scope” on page 76](#)
- [“Siebel Audit Trail Content” on page 76](#)
- [“Siebel Audit Trail Constraints” on page 77](#)
- [“Siebel Audit Trail for Siebel Remote and Siebel Replication Users” on page 78](#)

## Audit Scope

System administrators can specify the audit scope by the following means:

- Operations (such as read, update, new, delete, and export) performed on business components
- Operations performed in a specific time period
- Only those operations performed by certain responsibilities, positions, or employees
- Fields, for audits of read operations

## Siebel Audit Trail Content

For all auditable operations, the following information is stored:

- User ID of the person who performs the operation
- Date and time of the operation
- Record ID and row ID of the audited item

Table 12 lists some of the information that is stored for particular operations.

Table 12. Information Stored for Auditable Operations

| Operation   | Information Stored                                                                                                                                                                                                                               |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New Record  | <ul style="list-style-type: none"> <li>■ Name of the field on which the operation is performed</li> <li>■ Value of the field</li> </ul>                                                                                                          |
| Modify      | <ul style="list-style-type: none"> <li>■ Name of the field on which the operation is performed</li> <li>■ Old value of the field</li> <li>■ New value of the field</li> </ul>                                                                    |
| Copy Record | <ul style="list-style-type: none"> <li>■ Value of the field</li> </ul>                                                                                                                                                                           |
| Delete      | <ul style="list-style-type: none"> <li>■ Name of the field on which the operation is performed</li> <li>■ Value of the field when the user deleted the record</li> </ul>                                                                         |
| Associate   | <ul style="list-style-type: none"> <li>■ Parent business component</li> <li>■ Child business component</li> <li>■ Link information</li> </ul>                                                                                                    |
| Read        | <ul style="list-style-type: none"> <li>■ Name of the field that the user reads</li> <li>■ Value of the field at the time of the read operation, if the Read Field Value option is selected on the Administration - Audit Trail screen</li> </ul> |
| Export      | <ul style="list-style-type: none"> <li>■ Business component from which records are exported</li> <li>■ Row IDs of the exported records</li> <li>■ Number of records exported</li> </ul>                                                          |

Merging duplicate records can result in delete operations for the source records that are deleted and a modify operation for the surviving record that is updated with information from the deleted records. Variations of the delete operation for merged records include the Delete (Merge Record) operation for deleted merge records and the Delete Duplicate Assoc (Merge) operation for deleted records that are associated with deleted merge records. For more information about merging duplicate records, see *Siebel Fundamentals*.

## Siebel Audit Trail Constraints

The following cannot be audited:

- Virtual business components. Virtual business components do not bind to any underlying tables.
- Calculated fields. Typically, the value for a calculated field is derived from a table-based field. Audit a calculated field by auditing the table-based field that was used to derive the calculated field.

- Export of data using methods other than the following:
  - From the application-level menu, selecting File, then Export Data Map
  - Enterprise Integration Manager (EIM)
- Record inserts, updates, and deletes that are performed through Assignment Manager or workflow policy actions. These actions do not use the Siebel Application Object Managers.
- Business components that are based on external data sources.

**NOTE:** Siebel Audit Trail is not supported on the sample database.

## Siebel Audit Trail for Siebel Remote and Siebel Replication Users

The following information applies to remote and replication users:

- Audit trails are generated only when the user synchronizes data with the server.
- Audit trails are regenerated when the user synchronizes other data.
- If the transaction is rejected during the conflict resolution, then an audit trail record is not generated.

## Process of Configuring and Using Siebel Audit Trail

To set up and monitor Siebel Audit Trail, complete the following tasks:

- 1 [“Enabling and Disabling Siebel Audit Trail” on page 78](#)
- 2 [“Specifying Business Components and Business Component Fields for Audit” on page 79](#)
- 3 [“Setting Up Read Auditing” on page 81](#)
- 4 [“Specifying Parent–Child Associations for Audit” on page 81](#)
- 5 [“Specifying Siebel Audit Trail Restrictions” on page 82](#)
- 6 [“Verifying Siebel Audit Trail Configuration” on page 83](#)
- 7 [“Viewing Audit Trail Records” on page 83](#)

## Enabling and Disabling Siebel Audit Trail

By default, the Siebel Audit Trail functionality is enabled in Siebel Business Applications.

**NOTE:** Siebel Audit Trail creates history records for predefault values.

This task is a step in [“Process of Configuring and Using Siebel Audit Trail” on page 78](#).

### **To enable or disable Siebel Audit Trail**

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 To enable Siebel Audit Trail, set the value of the EnableAuditing system preference to TRUE.  
To disable Siebel Audit Trail, set the value to FALSE.
- 3 To enable Siebel Audit Trail for EIM, set the value of the EnableEimAuditing system preference to TRUE.  
To disable Siebel Audit Trail for EIM, set the value to FALSE.

## **Specifying Business Components and Business Component Fields for Audit**

You administer the business component and the business component fields to be audited from the Administration - Audit Trail screen. You cannot audit business components that are based on external data sources.

**NOTE:** If a field in the business component has a TYPE value of DTYPE\_CURRENCY, then the Exchange Date Field property for the field, which has a default value of Exchange Date, and the Currency Code Field property for the field, which has a default value of Currency Code, must have a value. You can set these values in Siebel Tools.

This task is a step in [“Process of Configuring and Using Siebel Audit Trail” on page 78.](#)

### **To configure the business component and business component fields to be audited**

- 1 Navigate to the Administration - Audit Trail screen.
- 2 In the Audit Trail Buscomp list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field            | Comments                                                                                                                                                                                                        |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Update           | Select the check box if you want to audit the Update operation.                                                                                                                                                 |
| New              | Select the check box if you want to audit the New operation.                                                                                                                                                    |
| Delete           | Select the check box if you want to audit the Delete operation.<br>Clear the check box if you want to not audit the Delete operation.                                                                           |
| Export           | Select the check box if you want to audit the Export operation.                                                                                                                                                 |
| Assoc            | Select the check box to audit associations with the child business components in the Child Buscomp list. For more information, see <a href="#">“Specifying Parent–Child Associations for Audit” on page 81.</a> |
| Restriction Type | Select a value that determines who is audited.                                                                                                                                                                  |

| Field      | Comments                                                                                                                                                                       |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start Date | Select the date on which the auditing starts.                                                                                                                                  |
| End Date   | Select the date on which the auditing stops.<br><br>Disable Siebel Audit Trail for an individual business component by setting the End Date to a date that has already passed. |

- 3** In the Field list, create a new record for the field you want to audit.

**NOTE:** If you do not create at least one new record for a field on the business component, then nothing is audited.

Some of the fields are described in the following table.

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field            | Select the field name you want to audit. The details of the selected field appear in the Table Name, Column Name, and Join columns.                                                                                                                                                                                                                                                                                                 |
| Read Field Value | Select the check box if you want to store the field value during the audits of read operations.                                                                                                                                                                                                                                                                                                                                     |
| Reading          | Select the check box if you want to audit the read operations.                                                                                                                                                                                                                                                                                                                                                                      |
| Table Name       | Displays the table to which the column belongs.                                                                                                                                                                                                                                                                                                                                                                                     |
| Column Name      | Displays the column name of the selected field.                                                                                                                                                                                                                                                                                                                                                                                     |
| Join             | Displays the join name associated with the column. You can audit only fields that are standard joins. Standard joins apply to existing fields in existing business components. You cannot audit customized implicit joins. Customized implicit joins are not visible in Siebel Tools in the Joins list for the business component. For more information about implicit joins, see <i>Configuring Siebel Business Applications</i> . |

- 4** Repeat [Step 3](#) until the Field list shows all the fields in that business component that you want to audit.

## Disabling Individual Business Components

Complete the following procedure to disable individual business components.

### *To disable individual business components*

- 1** Navigate to the Administration - Audit Trail screen.
- 2** Use one of the following methods to disable Siebel Audit Trail:
  - In the Audit Trail Buscomp list, enter an end date prior to today's date in the End Date field.
  - In the Audit Trail Buscomp list, delete the record for the business component.



# Setting Up Read Auditing

You can configure Siebel Audit Trail to audit read operations on records.

This task is a step in [“Process of Configuring and Using Siebel Audit Trail” on page 78](#).

## *To set up an audit trail of read operations*

- 1 Navigate to the Administration - Audit Trail screen.
- 2 In the Audit Trail Buscomp list, create a new record for the business component, and complete the necessary fields.

Some fields are described in the table in [Step 2](#) in [“Specifying Business Components and Business Component Fields for Audit” on page 79](#).

- 3 In the Field view, create a new record, and complete the necessary fields.

Some of the fields are described in the following table.

| Field   | Comments                                                      |
|---------|---------------------------------------------------------------|
| Field   | Select the name of the field on which you want read-auditing. |
| Reading | Select this field to indicate you want read-auditing.         |

- 4 Click Update Audit Cache.

# Specifying Parent–Child Associations for Audit

In Siebel Business Applications, parent–child associations are set through:

- MVG (multi-value group) fields
- Parent–child applets

Siebel Audit Trail can keep track of changes in parent–child associations. For example, you can audit the association (and dissociation) of contacts with accounts.

This task is a step in [“Process of Configuring and Using Siebel Audit Trail” on page 78](#).

## *To configure business components for auditing of parent–child associations*

- 1 Determine the name of the child business component with the association that you want to audit.
- 2 Navigate to the Administration - Audit Trail screen.
- 3 In the Audit Trail Buscomp list, perform one of the following steps:
  - Select an existing record for the parent business component.

- Create a new record for the parent business component, and complete the necessary fields. Some fields are described in table in [Step 2 on page 79](#).

- 4 Make sure that the Assoc field is checked.
- 5 Navigate to the Child Buscomp view.
- 6 In the Child Buscomp list, create a new record for the child business component that has an association with the parent business component you want to audit.

**NOTE:** If the Deep Delete user property is configured for the child business component, then create a new record for the child business component in the Audit Trail Buscomp list in the same way that you create a new record for a parent business component. In this case, do not create a new record for the child business component in the Child Buscomp list.

Some of the fields are described in the following table.

| Field              | Comments                                                                                 |
|--------------------|------------------------------------------------------------------------------------------|
| Link Name          | Select the link between the parent and child business components that you want to audit. |
| Child Buscomp      | Displays the child business component for the link.                                      |
| Parent Field       | Displays the parent field of the child business component.                               |
| Inter Child Column | Displays the name of the child column.                                                   |
| Table Name         | Displays the name of the table on which the link is based.                               |
| M/M                | Displays whether the link is a many-to-many link.                                        |

## Specifying Siebel Audit Trail Restrictions

You can restrict who gets audited by user, position, or responsibility.

For example, if you set the Restriction Type to User on the Audit Trail Buscomp Fields view, then navigate to the Audit Trail Users View and add the users to audit. Restriction by responsibility or position works in the same way.

This task is a step in ["Process of Configuring and Using Siebel Audit Trail" on page 78](#).

### To specify Siebel Audit Trail restrictions

- 1 Navigate to the Administration - Audit Trail screen.
- 2 In the Audit Trail Buscomp list, select a business component entry, and change the Restriction Type field to Position, Responsibility, or User.
- 3 Navigate to the Position, Responsibility, or User view.
- 4 Create or edit records in the position, responsibility, or user list for the audit trail.

The positions, responsibilities, or users you specify are audited for the operations on this particular business component.

- 5 Click Update Audit Cache.

## Verifying Siebel Audit Trail Configuration

The following steps are part of the verification process to make sure that the business component and business component fields were specified correctly.

This task is a step in [“Process of Configuring and Using Siebel Audit Trail” on page 78](#).

### *To verify Siebel Audit Trail records*

- 1 Navigate to the view for the business component that you want to audit.
- 2 Make a change to the data in that view.
- 3 Navigate to the Audit Trail screen, then the Audit Trail Items view.
- 4 In the Audit Trail Items list, query the business component and field values to make sure there is a new record showing the changes that you made to the business component.

## Viewing Audit Trail Records

After you have set up the fields, operations, responsibilities, positions, and employees to be audited, you can read the results of the audit trails in the Audit Trail view and the Audit Trail Items view.

This task is a step in [“Process of Configuring and Using Siebel Audit Trail” on page 78](#).

### Querying Audit Trail Information

After recording or importing audit trail records into the Siebel database, you can query audit trail information in the Audit Trail Items view. For example, you can query Audit Trail Items to determine changes made by team members, dates, or operations performed on a business component.

### *To query audit trail information*

- 1 Navigate to the Audit Trail screen, then the Audit Trail Items view.
- 2 Query the list for Audit Trail Items of interest.

Some fields are described in the following table.

| Field              | Comments                                                                           |
|--------------------|------------------------------------------------------------------------------------|
| Employee Login     | Displays the username of the user who changed the record.                          |
| Business Component | Displays the business component for the record where the database change occurred. |
| Field              | Displays the name of the field where the change occurred.                          |

| Field                    | Comments                                                                                                                                                                       |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Operation                | Displays the type of operation that was performed, for example, New Record, Delete, and so on.                                                                                 |
| Old Value                | Displays the value in the field before the database change occurred.                                                                                                           |
| New Value                | Displays the value in the field after the database change occurred.                                                                                                            |
| Date                     | Displays the timestamp of the change.                                                                                                                                          |
| Child Business Component | Displays the child business component for the record where the database change occurred, if any.                                                                               |
| Record ID                | Displays the unique identifier of the record that was changed.                                                                                                                 |
| Base Table               | Displays the name of the primary database table where the database change occurred.                                                                                            |
| Child Table Name         | Displays the name of the child table for the record where the database change occurred, if any.                                                                                |
| Column                   | Displays the name of the column in which the change occurred.                                                                                                                  |
| Group ID                 | Displays the unique identifier of the group to which the user who changed the record belonged.                                                                                 |
| Link                     | Displays the name of the link that describes the relationship between the child business component and the parent business component. This link is configured in Siebel Tools. |
| Table                    | Displays the name of table to which the selected field belongs in the Siebel database.                                                                                         |
| Row ID                   | Displays the unique identifier of the row in which the change occurred.                                                                                                        |
| Employee ID              | Displays the unique identifier of the user who changed the record.                                                                                                             |

## Querying Export Audit Trail Records

You can set up Export Audit Trail for a business component to monitor the export activities for the business component. Export activities include selecting Print or Print Preview in the list that appears when you click the cogwheel icon in a view to print a record in that view. You can view the results of export audit in the Export Audit Trail view. For details on setting up Export Audit Trail, see [“Specifying Business Components and Business Component Fields for Audit” on page 79](#).

### To query Export Audit Trail information

- 1 Navigate to the Audit Trail screen, then the Export Audit Items view.

- 2 Select the Audit Trail Item required.

Some fields are described in the following table.

| Field              | Comments                                                                     |
|--------------------|------------------------------------------------------------------------------|
| Employee Login     | Displays the username of the user who initiated the export.                  |
| Business Component | Displays the business component on which the export operation was performed. |
| Record Count       | Displays the number of records that were exported.                           |
| Date               | Displays the timestamp of the export activity.                               |
| Record IDs         | Displays the unique identifier for each record that was exported.            |
| Employee ID        | Displays the unique identifier for the user who initiated the export.        |

## Querying Read Audit Trail Records

You can use the Read Audit Trail feature to monitor the reading of sensitive information.

### To query Read Audit Trail information

- 1 Navigate to the Audit Trail screen, then the Read Audit Items view.
- 2 Select the Audit Trail Item required.

Some fields are described in the following table.

| Field              | Comments                                                                      |
|--------------------|-------------------------------------------------------------------------------|
| Employee Login     | Displays the username of the user who read the record.                        |
| Business Component | Displays the business component for the record that was read.                 |
| Record ID          | Displays the unique identifier of the record that was read.                   |
| Date               | Displays the timestamp of the read operation.                                 |
| Employee ID        | Displays the unique identifier of the user who read the record.               |
| Field Name         | Displays the name of the field that was read.                                 |
| Field Value        | Displays the value that was in the field at the time that the field was read. |

**NOTE:** To audit record field values, you must select Read Field Value in the Field view of the Administration - Audit Trail screen. For more information, see ["Specifying Business Components and Business Component Fields for Audit"](#) on page 79.

## Linking Siebel Audit Trail to a Business Component

In some circumstances, you might want to link the Audit Trail view to a specific business component view. For example, a Call Center team might want to see the audit trail records for individual service requests. Using Siebel Tools, you can create a view that allows the Call Center team to see these audit trail records, if the following conditions are met:

- Siebel Audit Trail must be running in database auditing.
- You must be able to audit the business component you are linking to Siebel Audit Trail. For information about determining if a business component can be used in Siebel Audit Trail, see [“Siebel Audit Trail Constraints” on page 77](#).

**NOTE:** Because Audit Trail Item records are not routed to mobile Web clients, data in these linked views can appear only in Siebel Web Client and the Siebel Developer Web Client. Make sure that mobile clients do not have access to views displaying audit trail data.

### *To link Siebel Audit Trail to a business component*

- 1 Complete the following steps in Siebel Tools:
  - a Create a link between the Audit Trail Item 2 business component and the business component to which you are linking Siebel Audit Trail, and set the parent business component property of the link to the name of the audited business component.  
  
For example, if you are configuring the view to show the audit trail records for the Product Defect business component, then the parent business component is Product Defect. The Child Business Component for the link is Audit Trail Item List 2. The Source and Destination Fields for the link are Id and Record ID respectively.
  - b Modify the business object for the business component to which you are linking Siebel Audit Trail.  
  
You must create Audit Trail Item 2 as one of the business object components, and specify the Link property as the link you created in [Step a](#).
  - c Create a view that has an applet that is based on the selected business component as a parent, and the Audit Trail Item List 2 applet as a child.
  - d Add this view to a screen.
- 2 Launch one of the Siebel employee applications.
- 3 Navigate to the Administration - Application screen, then the Views view.
- 4 In the Responsibilities, add the responsibilities that are applicable to the new view.

## Decoding the Audit Log File

Audit trail data is stored in an encoded form in the Siebel database to maximize the performance of the overall Siebel application.

## Audit Trail Item 2 Virtual Business Component

You can use the Audit Trail Item 2 virtual business component to export your audit trail data to a data warehouse. To maintain compatibility with data from previous Siebel versions, you must decode the new information and store the newly formatted records into the old format.

All audit trail values for a single transaction are grouped together into one record in the S\_AUDIT\_ITEM table. Previously, values were stored in the OLD\_VAL and NEW\_VAL fields. The NEW\_VAL and OLD\_VAL columns are no longer populated in S\_AUDIT\_ITEM table. Instead, the fields and values for an audit transaction are grouped into the AUDIT\_LOG column of the S\_AUDIT\_ITEM table.

To decode audit items, you can call the Audit Trail Item 2 virtual business component. The Audit Trail Item 2 business component is no longer based on S\_AUDIT\_ITEM table. Instead, this business component is now a virtual business component that is based on a highly specialized class that has its own business logic to retrieve data from S\_AUDIT\_ITEM table.

**NOTE:** Using the virtual business component to decode audit trail data is the only method that Oracle supports. The virtual business component is updated to reflect any changes in the underlying data structure.

## Workflow to Decode Audit Data

The workflow that you use to decode audit data depends on how you use the data. If you are implementing an archival solution, then you might want to implement a solution that reads all created records. If you are implementing a more data-oriented solution, then you must implement a solution that has more control of the data.

The following is an example of a high level flow for reconstructing data:

- 1 Start the Audit Trail Item 2 virtual business component.
- 2 In a search time window, run a query for Audit Trail Item 2.
- 3 Run an query for Audit Trail Item - Data, where the date and time match the previous record.
- 4 Write out the decoded record ID: New Val, Old Val.

This step is entirely dependant on your specific requirements and can range from writing to a custom table in the Siebel database to sending the decoded data to an external data source using one of the EAI Transports.

You can modify this flow to restrict the data returned by business component, user, position, and so on. However, the flow must always include the fundamental aspect of querying both the Audit Trail Item 2 virtual business component and the Audit Trail Item – Data business component to construct a record consistent with format of a previous version of a Siebel Audit Trail record.

Use this flow to make sure that duplicate records are not included in the export of audit trail data to a data warehouse. In this flow, row IDs are not obtained from the Audit Trail Item - Data business component to create records with unique row IDs but to identify already-exported records. This identification occurs in the data warehouse. (Due to the encoded format of the Audit Trail Item - Data business component, a virtual record in the Audit Trail Item 2 virtual business component does not always map one-to-one to a physical database record in the Audit Trail Item - Data business component. Consequently, a record for the Audit Trail Item 2 virtual business component does not always have a unique row ID.)

Next, you must create a trigger for the workflow you are using to decode audit data. You can use a reactive trigger through runtime events or workflow policies. If you need real-time or near-real-time onward transmission of the audit trail data, then consider using a reactive trigger. However, consider that the volume of transactions occurring on the audit tables is high, so any per-record solution might cause unwanted performance effects on the entire Siebel application. Any deployment using a reactive trigger on audit data requires extensive performance profiling.

For any situation that does not require real-time data transmission, consider an asynchronous batch approach using a mechanism such as repeating component requests. You can tune and adjust these requests so that the frequency of the job matches the data and performance requirements of the Siebel application. In many cases, you can time these requests to run during periods of reduced activity in the Siebel application. It is recommended that you use this approach for the majority of use cases.

You can use either a custom business service in conjunction with a workflow process, or you can use a workflow process on its own to implement your solution to decode audit trail data. Leveraging only a workflow process might assist in the long term maintenance of the solution if you think that it might require modification over time; however this approach also adds complexity to the solution due to the requirements of stepping through data sets and restricting records.

## Example Business Service

This example provides sample code for a business service that you can use to retrieve and decode data; note however that the search specification is arbitrary. Carefully consider this search specification for individual implementations. You can apply a search specification to only fields that map to physical columns, and not to encoded fields.

```

/*****
/* function: decodeAuditTrail
/*
/* The top level function to read audit trail data encoded in Siebel 8.x format */
/* allowing the data to be exported as simple value pairs for purposes of archival */
/* or business intelligence. */
*****/

function decodeAuditTrail(strTimediff)
{
  try {
    // Create objects

    var boAudit = TheApplication().GetBusObject("Audit Trail");
    var bcAuditItem = boAudit.GetBusComp("Audit Trail Item 2");
    with(bcAuditItem) {
      SetViewMode(AllView);
      ClearToQuery();

      // Set the search specification. In this example we are only

```



```

// using time differential.
SetSearchSpec("Date", ">= " + strTimediff);
ExecuteQuery(ForwardOnly);
var bRecord = FirstRecord();
while(bRecord) {
    //Retrieve field values
    var strRecordId = GetFieldValue("Record Id");
    var strBC = GetFieldValue("Business Component");
    var strFieldName = GetFieldValue("Field");
    var strOldVal = GetFieldValue("Old Value");
    var strNewVal = GetFieldValue("New Value");
    var strDate = GetFieldValue("Date");

    //Query for underlying Row Id
    /******
    /* function: getAuditRowId
    /*
    /* Retrieves the physical row ID associated with the decoded audit record to
    /* provide a defined cutoff for the audit export operation. In cases where
    /* more than one record is retrieved, an error is thrown because the defined
    /* cutoff is not unique, and the operation is retried with new parameters.
    /*
    /******
    var strAuditId = getAuditRowId(strRecordId, strDate);

    //Placeholder for function to write out values
    writeAuditValues(strAuditId, strBC, strFieldName, strRecordId,
    strOldVal, strNewVal, strDate);
    bRecord = NextRecord();
}
}
}
catch(e)
{
    throw(e);
}

```

```

}

function getAuditRowId(strAuditRecordId, strAuditRecordDate)
{
    var strReturn = "";
    try
    {
        // Create objects
        var boAudit = TheApplication().GetBusObject("Audit Trail");
        var bcAuditData = boAudit.GetBusComp("Audit Trail Item - Data");
        with(bcAuditData) {
            SetViewMode(AllView);
            ClearToQuery();
            // Set the search specification for the combination of
            // record Id and date
            SetSearchSpec("Date", strAuditRecordDate);
            SetSearchSpec("Record Id", strAuditRecordId);
            ExecuteQuery(ForwardOnly);
            var bRecord = FirstRecord();
            if(bRecord) {
                strReturn = GetFieldValue("Id");
                // Check to see that we only have one record
                bRecord = NextRecord();
                if(bRecord) {
                    throw("Error: Multiple Record Id and Date records
                    identified");
                }
            }
        }
    }
    else
        strReturn = "";
}

```

```

}
catch(e)
{
    throw(e);
}
return(strReturn);
}

```

## Importing Siebel Audit Trail with Enterprise Integration Manager

You can import existing audit trail data into Siebel with Siebel Enterprise Integration Manager. You can use the Enterprise Integration Manager tables for Siebel Audit Trail to import your data from a previous version of Siebel. The current version of Siebel CRM uses the same table columns as the previous version of Siebel. The virtual business component displays the data from the previous version of Siebel along with the data from the current version of Siebel.

Enterprise Integration Manager tables for Siebel Audit Trail are designed for use solely as a data loading exercise. Oracle does not support runtime insertion of data into the Siebel Audit Trail tables by any mechanism other than Siebel Audit Trail. For more information about Siebel Enterprise Integration Manager, see *Siebel Enterprise Integration Manager Administration Guide*.

## Customizing Siebel Audit Trail

Siebel Audit Trail is a closed set of functionality that is designed to be used as delivered. It is one of the very few areas of the Siebel application that is not suitable for additional customization and configuration by integrators or customers. Audit trail data is stored in an internal format and is only accessible through the virtual business component.

**NOTE:** Additional custom columns and trigger points for inserting audit trail data are not supported.



# 7

## Usage Pattern Tracking

This chapter includes information about usage pattern tracking (UPT) in Siebel Business Applications. It includes the following topics:

- [About Usage Pattern Tracking on page 93](#)
- [Process of Setting Up Usage Pattern Tracking on page 94](#)
- [Usage Pattern Collection on page 97](#)
- [Processing Usage Pattern on page 97](#)
- [Viewing Usage Patterns on page 99](#)
- [Details of Records for Usage Pattern Tracking on page 100](#)
- [Application Programming Interfaces for Usage Pattern Tracking on page 101](#)

### About Usage Pattern Tracking

Usage pattern tracking allows administrators to review details about when and how often users access the features in a Siebel application. To capture information about this user access, administrators set up a component job to run at a scheduled date and time or at time intervals that they specify. Administrators can configure usage pattern tracking to apply to only the user events that they designate. They can also configure usage pattern tracking to apply to events that are associated with client scripts, such as browser scripts and JavaScripts, and with server scripts.

After the component job for usage pattern tracking runs, administrators can view information about the user events and event details in the Usage Pattern Tracking view of the Administration - Application screen.

For example, administrators can implement usage pattern tracking to:

- Monitor how often users use a Siebel application, an applet, or a business component so that they have reliable information to change application configuration and features and to simplify the user interface.
- Monitor how users use a feature in a Siebel application to facilitate user training and to gather details about the actions that lead to error conditions.
- Monitor feature usage after application upgrades or during development cycles to evaluate the usefulness of upgrades or new development and to optimize test cycles.

Usage pattern tracking is designed to minimize the impact on the performance of Siebel Business Applications. It is recommended that administrators consider the business requirements of their organizations, and monitor only the necessary events to minimize any adverse affect on performance.

# Process of Setting Up Usage Pattern Tracking

To set up usage pattern tracking, perform the following tasks:

- 1 [“Setting System Preferences for Usage Pattern Tracking” on page 94](#)
- 2 [Process of Configuring Usage Pattern Tracking on page 95](#)

## Setting System Preferences for Usage Pattern Tracking

Complete the procedure in this topic to set the system preferences for usage pattern tracking.

This task is a step in [“Process of Setting Up Usage Pattern Tracking” on page 94](#).

### *To set system preferences for usage pattern tracking*

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Set the system preferences in the following table.

| System Preference    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable UPT           | Set this system preference to TRUE to implement usage pattern tracking.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| UPT Max Record Count | <p>Set this system preference to the number of records for usage pattern tracking that are kept in memory. When memory exceeds the number of records that you specify for this system preference, the records are moved to .csv files for users at the following location: <code>siebsrvr\upt\username</code>. Eventually, the UPT Process workflow moves the information in the .csv files to tables in the Siebel database. For more information about these tables, see <a href="#">“Viewing Usage Patterns” on page 99</a>.</p> <p>Available memory and the anticipated level of user activity determine the appropriate value for this system preference. Its minimum value is 100, and its maximum value is 1,000.</p> |

- 3 Complete the following steps to create system preferences for the end-to-end events (EEEs) to include in usage pattern tracking (UPT):
  - a In the System Preference Name field, enter a name, such as UPTEEE1, UPTEEE2, for the pair of events in each end-to-end event.

- b** In the System Preference Value field, enter a pair of events for each name in [Step a](#), and separate the events with a comma.

The first event designates the start of the end-to-end event, and the second event designates the end of the end-to-end event. Example event pairs include: WebLogin, WebLogout and ViewActivated, ViewDeactivated.

You can obtain possible events by navigating to the Events view of the Administration - Runtime Events screen. Each value (Applet, Application, and BusComp) in the Object Type field of this view is associated with a set of events in the Events field of this view. Both of the events that you enter in an end-to-end event must be associated with the same object type. For information about the descriptions of event values, see *Siebel Personalization Administration Guide*.

- c** In the System Preference Name field, enter a name of UPTEndToEndEventList.

- d** In the System Preference Value field for the UPTEndToEndEventList name, enter each name that you create in [Step a](#), and separate each name with a comma.

- 4** To implement the system preferences that you set, restart the Siebel Application Object Manager component.

For information about restarting Siebel Server components, see *Siebel System Administration Guide*.

## Process of Configuring Usage Pattern Tracking

To configure usage pattern tracking, perform the followings tasks:

- 1** [“Creating Action Sets for Events” on page 95](#)
- 2** [“Associating Action Sets With Events” on page 96](#)

### Creating Action Sets for Events

An action set includes the actions that are executed when an event occurs. After you create an action set with one action for usage pattern tracking, you associate this action set with the events that you want to monitor. For more information about creating action sets, see *Siebel Personalization Administration Guide*.

This task is a step in [“Process of Configuring Usage Pattern Tracking” on page 95](#).

#### **To create an action set for events**

- 1** Navigate to the Administration - Runtime Events screen, then the Action Sets view.

- 
- 2** In the Action Sets list, create a new record, and complete the necessary fields.

Some of the fields are described in the following table.

| Field | Comments                        |
|-------|---------------------------------|
| Name  | Type a name for the action set. |

- 
- 
- 3** In the Actions list, create a new record for the action in the action set, and complete the necessary fields.

Some of the fields are described in the following table.

| Field                   | Comments                                                           |
|-------------------------|--------------------------------------------------------------------|
| Name                    | Type a name for the action.                                        |
| Action Type             | Select the BusService action type for the action.                  |
| Sequence                | Type a sequence number of 1 for the action.                        |
| Business Service Name   | Type Usage Pattern Service for the business service of the action. |
| Business Service Method | Type UsageLog for the business service method of the action.       |

## Associating Action Sets With Events

After creating the action set, you associate it with the events to include in usage pattern tracking. The business service method (UsageLog) in the business service (Usage Pattern Service) of the action set is called when the events occur.

This task is a step in ["Process of Configuring Usage Pattern Tracking" on page 95](#).

### *To associate the action set with events*

- 1** Navigate to the Administration - Runtime Events screen, then the Events view.
- 2** In the Events list, create a new record for each event, and complete the necessary fields.

Some of the fields are described in the following table.

| Field       | Comments                                                                                                                                              |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sequence    | Type a number to denote order in which the action set associated with the event executes relative to the other action sets associated with the event. |
| Object Type | Select the appropriate object type for the event. Values include: Applet, Application, and BusComp.                                                   |



| Field                  | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Event                  | <p>Select the appropriate event. The object type that you select determines the events that are available for selection. For information about the descriptions of event values, see <i>Siebel Personalization Administration Guide</i>.</p> <p>The following events for all object types are available for usage pattern tracking:</p> <ul style="list-style-type: none"> <li>■ <b>UPTGeneric.</b> This event occurs when the server calls the TriggerUPTEvent application programming interface (API).</li> <li>■ <b>UPTClientScript.</b> This event occurs when a client script, such as a browser script or JavaScript, calls the TriggerUPTEvent application programming interface (API). For more information, see <a href="#">“Browser Script Application Programming Interface” on page 101</a> and <a href="#">“JavaScript Application Programming Interface” on page 102</a>.</li> <li>■ <b>UPTServerScript.</b> This event occurs when a server script calls the TriggerUPTEvent application programming interface (API). For more information, see <a href="#">“Server Script Application Programming Interface” on page 103</a>.</li> </ul> |
| Action Set Name        | Select the action set name that you create in <a href="#">Step 2 of “Creating Action Sets for Events” on page 95</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Conditional Expression | Type a conditional expression to refine the data that applies to the event. You can click the select button in this field to access the Expression Designer dialog box where you can construct the expression. For example, if you want to monitor the event for only specific users, then you can specify those users in a conditional expression.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Usage Pattern Collection

Restart the sieb server, login, and then continue with the use case for which the usage log is required. The usage log is stored under the following folder:

```
siebsrvr\upt\$username$
```

## Processing Usage Pattern

To process usage pattern tracking, perform the followings tasks:

- 1 [Activating the Workflow for Usage Pattern Tracking on page 98](#)
- 2 [Creating Job Templates for Usage Pattern Tracking on page 98](#)
- 3 [Creating Component Jobs for Usage Pattern Tracking on page 99](#)

## Activating the Workflow for Usage Pattern Tracking

Complete the procedure in this topic to activate the workflow for usage pattern tracking. You designate this workflow in the job parameters of the component job that runs to capture information about usage pattern tracking.

This task is a step in [“Process of Setting Up Usage Pattern Tracking” on page 94](#).

### *To activate the workflow for usage pattern tracking*

- 1** Complete the following steps to make sure that the appropriate component group and the appropriate component in that component group are enabled:
  - a** Navigate to the Administration - Server Configuration screen, Enterprises, and then the Component Groups view.
  - b** Make sure that the Workflow Management component group is enabled.  
  
When you select the record for this component group, the components associated with the component group appear in the Components list. The Workflow Process Batch Manager component in this component group must be active and enabled.
- 2** Navigate to the Administration - Business Process screen, Workflow Deployment, and then the Active Workflow Processes view.
- 3** In the Repository Workflow Processes list, select the UPT Process workflow.
- 4** Click Activate.

## Creating Job Templates for Usage Pattern Tracking

Complete the procedure in this topic to create a template for the component job that captures information about usage patterns.

This task is a step in [“Process of Setting Up Usage Pattern Tracking” on page 94](#).

### *To create a job template for usage pattern tracking*

- 1** Navigate to the Administration - Server Configuration screen, then the Job Templates view.
- 2** In the Job Templates list, create a new record, and complete the necessary fields.

Some of the fields are described in the following table.

| Field      | Comments                                                                                                                                                           |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name       | Type a name of UPT Job Template.                                                                                                                                   |
| Short Name | Type a short name of UPT JT.                                                                                                                                       |
| Component  | Select the Workflow Process Batch Manager component. Additional fields in the job template record are automatically populated. Do not change these default values. |

- 3 In the Job Parameters list, create two parameters as follows:
  - a Select Method Name in the Name field of the first job parameter.  
Additional fields in this job parameter record are automatically populated.
  - b Select Workflow Process Name in the Name field of the second job parameter, and enter UPT Process in the Value field.  
Additional fields in this job parameter record are automatically populated.

## Creating Component Jobs for Usage Pattern Tracking

You use the job template for usage pattern tracking to create a component job for usage pattern tracking. This component job captures information about usage patterns. You can set this component job to run only once at scheduled date and time or to run at regular time intervals that you specify. For information about administering component jobs, including creating, starting, deleting, cancelling, holding, resuming, and troubleshooting such jobs, see *Siebel System Administration Guide*.

This task is a step in [“Process of Setting Up Usage Pattern Tracking” on page 94](#).

### To create a component job for usage pattern tracking

- 1 Navigate to the Administration - Server Management screen, then the Jobs view.
- 2 In the Jobs list, create a new record, and select UPT Job Template in the Component/Job field.  
The job parameters that you set up in the job template appear in the Job Parameters list. Do not change these parameters or add more parameters to the list.
- 3 Populate additional fields in the Job Detail form as necessary.

These fields define how frequently the job is run and the conditions under which the job is run. The number of events that you include in usage pattern tracking and the anticipated level of user activity determine the appropriate values for these fields. For more information about these fields, see *Siebel System Administration Guide*.

## Viewing Usage Patterns

After the component job for usage pattern tracking runs, information about user events and event details appears in the Usage Pattern Tracking view of the Administration - Application screen.

This view contains the data about usage pattern tracking that is stored in the S\_USER\_EVENT table and the S\_USER\_EVT\_DTL table. The number of records in these tables depends on the events that you configure for usage pattern tracking. It is recommended that you periodically move data from these tables. Your movement frequency depends on available memory and the level of user activity.

For reporting purposes, you can click the cogwheel icon and select the Export option to export the data from the Usage Pattern Tracking view to another application, such as Microsoft Excel.

**To view usage patterns**

- 1 Navigate to the Administration - Application screen, then the Usage Pattern Tracking view.
- 2 In the User Events list, view information about the events associated with users.  
Some of the fields are described in the following table.

| Field            | Comments                                                              |
|------------------|-----------------------------------------------------------------------|
| User Name        | Displays the user ID of the user who completed the event.             |
| Session Id       | Displays the ID of the session in which the user completed the event. |
| Event Name       | Displays the name of the event that the user completed.               |
| Event Start Date | Displays the date and time that the user started the event.           |
| Event End Date   | Displays the date and time that the user ended the event.             |

- 3 In the User Event Details list, view details about a selected event.

## Details of Records for Usage Pattern Tracking

Administrators can review the details of records for usage pattern tracking in their work to generate reports for this feature. An example of the structure and attributes of a record for usage pattern tracking in the Siebel database follows:

```
<UPT>
  <Object Type> ; Application
  <Object Name> ; Siebel Universal Agent
  <Event Name> ; UPTServerScript
  <Event Source> ; Server Script
  <Event Context> ; Test UPT
  <Event Start Date> ; 07/30/2015 11:41:46
  <Event End Date> ; 07/30/2015 11:43:31
  <UPT Details> ;
    <Detail1>
      <Name> ; Test UPT Name
      <Value> ; Test UPT Value
    </Detail1>
```

```
</UPT Details>
```

```
</UPT>
```

Information about the content in this structure follows:

- The Object Type attribute is a value of Applet, Application, or BusComp.
- The Object Name attribute is the name of the object.
- The Event Name attribute is a value selected from the Events view of the Administration - Runtime Events screen.
- The Event Source attribute is Browser Script, Server Script, or a user-defined value.
- The Event Context attribute is a short description of the event context.
- The Event Start Date attribute is a value that the Siebel application defines, and its format depends on the format in the locale setting. You cannot change this value.
- The Event End Date attribute is a value that the Siebel application defines, and its format depends on the format in the locale setting. You cannot change this value.
- The Name attribute is a name that provides more information about the event context.
- The Value attribute is a value that provides more information about the event context.

## Application Programming Interfaces for Usage Pattern Tracking

This topic includes information about the application programming interfaces (APIs) for usage pattern tracking.

For more information about APIs for UPT, see:

- [“Browser Script Application Programming Interface” on page 101](#)
- [“JavaScript Application Programming Interface” on page 102](#)
- [“Server Script Application Programming Interface” on page 103](#)

### Browser Script Application Programming Interface

The browser script application programming interface (API) follows:

```
theApplication(). TriggerUPTEvent (inputPropSet)
```

Example code for this API follows:

```
var uptRecord = CCFMiscUtil_CreatePropSet();  
var details = CCFMiscUtil_CreatePropSet();  
uptRecord.SetType("UPT");
```

```

uptRecord.SetProperty("Object Type", "Application");
uptRecord.SetProperty("Object Name", "Siebel Universal Agent");
uptRecord.SetProperty("Event Name", "UPTClientScript");
uptRecord.SetProperty("Event Sub name", "Test");
uptRecord.SetProperty("Event Source", "Client Script");
uptRecord.SetProperty("Event Context", "Test UPT");
details.SetType("UPT Details");
details.SetProperty("Detail1", "Test UPT Value1");
details.SetProperty("Detail2", "Test UPT Value2");
uptRecord.AddChild(details);
theApplication().TriggerUPTEvent(uptRecord)

```

Information about the input property set follows:

- The Object Type property is a value of Applet, Application, or BusComp. This default value is Application.
- The Object Name property is a value that you specify. The default value is the application name from the configuration file.
- The Event Name property is a value of UPTGeneric, UPTClientScript, or UPTServerScript. The default value is UPTClientScript.
- The Event SubName property is a value that you specify. You can specify no value.
- The Event Source property is a value that you specify. The default value is Client Script.
- The Event Context property is a value that you specify.

## JavaScript Application Programming Interface

The JavaScript application programming interface (API) follows:

```
SiebelApp.S_App.TriggerUPTEvent(inputPropSet)
```

Example code for this API follows:

```

var uptRecord = CCFMiscUtil_CreatePropSet();
var details = CCFMiscUtil_CreatePropSet();
uptRecord.SetType("UPT");
uptRecord.SetProperty("Object Type", "Application");
uptRecord.SetProperty("Object Name", "Siebel Universal Agent");

```

```

uptRecord.SetProperty("Event Name", "UPTClientScript");
uptRecord.SetProperty("Event Sub name", "Test");
uptRecord.SetProperty("Event Source", "Client Script");
uptRecord.SetProperty("Event Context", "Test UPT");
details.SetType("UPT Details");
details.SetProperty("Detail1", "Test UPT Value1");
details.SetProperty("Detail2", "Test UPT Value2");
uptRecord.AddChild(details);

SiebelApp.S_App.TriggerUPTEvent(uptRecord)

```

Information about the input property set follows:

- The Object Type property is a value of Applet, Application, or BusComp. This default value is Application.
- The Object Name property is a value that you specify. The default value is the application name from the configuration file.
- The Event Name property is a value of UPTGeneric, UPTClientScript, or UPTServerScript. The default value is UPTClientScript.
- The Event SubName property is a value that you specify. You can specify no value.
- The Event Source property is a value that you specify. The default value is Client Script.
- The Event Context property is a value that you specify.

## Server Script Application Programming Interface

The server script application programming interface (API) follows:

```
TheApplication(). TriggerUPTEvent (inputPropSet)
```

Example code for this API follows:

```

var uptRecord = TheApplication().NewPropSet ();
var details = TheApplication ().NewPropSet ();
uptRecord.SetType("UPT");
uptRecord.SetProperty("Object Type", "Application");
uptRecord.SetProperty("Object Name", "Siebel Universal Agent");
uptRecord.SetProperty("Event Name", "UPTServerScript");
uptRecord.SetProperty("Event Sub name", "Test");

```

```
uptRecord.SetProperty("Event Source", "Server Script");  
uptRecord.SetProperty("Event Context", "Test UPT");  
details.SetType("UPT Details");  
details.SetProperty("Detail1", "Test UPT Value1");  
details.SetProperty("Detail2", "Test UPT Value2");  
uptRecord.AddChild(details);  
TheApplication().TriggerUPTEvent(uptRecord)
```

Information about the input property set follows:

- The Object Type property is a value of Applet, Application, or BusComp. This default value is Application.
- The Object Name property is a value that you specify. The default value is the application name from the configuration file.
- The Event Name property is a value of UPTGeneric, UPTClientScript, or UPTServerScript. The default value is UPTServerScript.
- The Event SubName property is a value that you specify. You can specify no value.
- The Event Source property is a value that you specify. The default value is Server Script.
- The Event Context property is a value that you specify.



# 8

## Upload of UPT and UPT-IRM Intersect Data

This chapter covers information about how to upload usage pattern tracking (UPT) data as well as its intersection with incremental repository merge (IRM) data to the Siebel CRM database to reduce the cost of testing post upgrade of Siebel CRM. It includes the following topics:

- [Overview of UPT and IRM Data on page 105](#)
- [Process of Uploading and Intersecting Data on page 106](#)

### Overview of UPT and IRM Data

The UPT data allows administrators to review details about when and how often users access the features in a Siebel CRM application. The process of performing UPT yields a set of .csv files.

**NOTE:** The information in this chapter is applicable only when you run IRM after migrating from a prior Siebel CRM release in which UPT was enabled such as version 15.5 or later. For information about the specific releases (including applicable patchset releases) for which UPT can be enabled, see 2145521.1 (Article ID) on My Oracle Support. For more information about Usage Pattern Tracking, see [Chapter 7, “Usage Pattern Tracking,”](#) and for running IRM, see *Siebel Database Upgrade Guide*.

As a Siebel CRM database administrator, you also obtain a set of .csv files when you use IRM to apply Siebel Innovation Pack during database upgrade (see *Siebel Database Upgrade Guide*).

Execution of UPT is an optional but recommended process. IRM is a mandatory process for customers upgrading from a previous Siebel Innovation Pack to the current one. Both yield .csv files that you may upload to your Siebel CRM database for further analysis in the form of reports. The .csv files of UPT list the actual repository objects in use by end users. In the case of IRM, these files list the repository objects modified or newly added during the ongoing IRM process. The actual change to a repository object is termed direct change. This change may trigger an indirect change to other objects in its hierarchy. Both types of changes reflect in the IRM log (see *Siebel Database Upgrade Guide*) and the UPT-IRM Intersection report (see [Chapter 9, “Analytical Reports for UPT and UPT with IRM Intersection”](#)).

**NOTE:** The objects exported to the IRM .csv file are Business Objects, Business Components, Applets, Views, Web Pages, Schema and Workflows. The export is performed during the Upgrade Repository (upgrep) process once IRM is completed.

You can choose to perform only UPT to monitor and report usage data or IRM to upgrade to a Siebel Innovation Pack or both.

### Benefits of Intersecting UPT-IRM Merge

It is useful to compare the UPT .csv with the IRM .csv files so as to focus testing only on objects that are in use by the customer as well as modified by IRM and not on all modified objects. If you choose to compare the two sets of .csv files, the intersection will yield a list of repository objects that are used and modified. These objects are the ones most used by end users and, therefore, require more testing.

**NOTE:** To intersect UPT and IRM data, you need to migrate from Siebel CRM version 15.0 or 15.5 as UPT is enabled on the patchsets of these versions only.

When you intersect UPT data with IRM data, you obtain an accurate view of the actual product components used by a customer and the repository artifacts that IRM touches during the upgrade cycle. This targeted testing will help customers:

- Obtain data-backed targeted and specific investments so as to get predictable results.
- Reduce the cost of upgrades and cost of ownership through focused functional, integration, and performance testing post upgrade.

For example, UPT events may indicate that 10 applets across five views in two screens are the only objects used by a customer. IRM delta changes may be across 15 applets, 10 views, and 12 screens. The resultant intersection of UPT and IRM could be 6 applets, 3 views, and 1 screen. This would be generated as a report and be an output of the IRM Upgrade cycle. This will help the customer focus on testing the entities obtained solely from the intersection. The resultant saving will be on resources, time, and money.

## Process of Uploading and Intersecting Data

At the broad level, the steps are to upload the data into the database and intersect it with IRM. To upload the UPT data and intersect it with the IRM data, perform the following tasks:

- “Installing the File Upload Utility” on page 106
- “Installing OBIEE” on page 107
- “Generating UPT and Performing IRM” on page 107
- “Uploading UPT and UPT-IRM Intersect Data” on page 107
- “Intersecting UPT and UPT-IRM Data” on page 108

### Installing the File Upload Utility

The UPT data upload utility is multi-purpose as it can be used to both upload batches of .csv files and perform their intersect. Its purpose is to:

- Upload the UPT .csv files to the Siebel CRM database.
- Compare UPT .csv with IRM .csv files.
- Upload the intersected UPT-IRM .csv files to the Siebel CRM database.

For more information on how to install this utility, see [Chapter 9, “Analytical Reports for UPT and UPT with IRM Intersection.”](#)

## Installing OBIEE

You use Oracle Business Intelligence Enterprise Edition (OBIEE) to view the uploaded data in the form of prebuilt or custom reports.

For more information on installing OBIEE, see *Installing Oracle Business Intelligence*.

## Generating UPT and Performing IRM

You must generate UPT and perform IRM, producing a set of .csv files from each process.

- To generate UPT-related .csv files, perform the steps in [Chapter 7, “Usage Pattern Tracking.”](#)
- To generate IRM-related .csv files, perform the steps in *Siebel Database Upgrade Guide*.

**NOTE:** Place the generated .csv files in folders, such as C:\UPTFiles or C:\IRMFiles, on your local or remote machine.

## Uploading UPT and UPT-IRM Intersect Data

Use this procedure to upload the data.

### *To upload UPT and UPT-IRM Intersect data to a Siebel CRM database*

- 1 Create a folder on your local or remote machine, such as C:\UPT, to copy the database .jar and utility files.
- 2 Download the database-specific .jar file to this location as per your database as follows:
  - Oracle: ojdbc6.jar
  - MSSQL: sqljdbc4-2.0.jar
  - DB2: db2jcc.jar

**NOTE:** You can obtain the .jar files from the respective database clients.

- 3 Download your choice of data upload utility to the same folder.
  - To execute the data upload utility from command prompt, download UPTFileUpload.jar
  - To execute the data upload utility from the user interface, download UPTUtilities.jar

**NOTE:** You can obtain the .jar files from the SIEBEL\_ROOT/dbsrvr/common folder. You can execute them where Siebel Server is installed or copy them to another environment where Java 8 is installed. Ensure your system has JRE 1.8 or above.

- 4 Navigate to the folder where you downloaded the utility.

- To upload the UPT .csv files from the command prompt, enter as follows:

```
java -jar UPTFileUpload.jar /s [Database Server] /f [CSV files folder path] /d  
[Database Type - Oracle, DB2UDB or MSSQL] /u [Database User] /p [Database  
Password] /h [Host Name] /o [Database Port] /r [Data Purpose] /t [Table Owner]
```

For example:

```
java -jar UPTFileUpload.jar /s dbixt1 /f c:/UPTFiles /d Oracle /u SMITH123 /p  
SMITH123 /h smith01ixt /o 1551 /r test /t SMITH123
```

**NOTE:** To learn more about the arguments for the data upload utility, invoke its Help. You can run the script multiple times but it will load only newly added files or the files where user corrected errors shown in earlier parse. Ensure that the table owner has the table create, read, and write access.

- To upload from user interface, enter as follows at the command prompt to open the utility:

```
java -jar UPTUtilities.jar
```

**NOTE:** Pass the parameters to the utility to enable upload of each .csv file.

- 5 The utility processes each .csv file and records its filename in any of the following three files as per processing status:
  - **ProcessedFiles.log:** logs files processed successfully along with the row count per file.
  - **UnProcessedFiles.log:** logs files that did not upload along with their error description.
  - **Fileupload.log:** logs all steps in file execution, including technical issues, such as incorrect folder or connectivity to a database, along with error description.
- 6 The processed files are stored in the folder created in the Note at [Step 2 on page 107](#).

## Intersecting UPT and UPT-IRM Data

To view and analyze the .csv files, you can view them in any supporting editor or upload them to the Siebel CRM database. For more information on how to view UPT and IRM data on the Siebel CRM database, see [Chapter 9, “Analytical Reports for UPT and UPT with IRM Intersection.”](#)

Performing an intersect of the UPT and IRM data provides:

- A list of objects from the UPT-IRM intersect indicating those that are used and modified and, therefore, require testing.
- Prebuilt reports, such as UPT-IRM Intersection, after loading data on OBIEE.
- UPT raw data to use with any analytics tool to generate custom reports.

### To intersect UPT and UPT-IRM data

- 1 Perform the steps shown in [“To upload UPT and UPT-IRM Intersect data to a Siebel CRM database” on page 107](#).

**NOTE:** Create a separate folder, such as C:\IRMFiles, in which to copy the IRM files.

- Download the IntersectUPTMrg.jar to the same folder if you want to use the command prompt to intersect the .csv files or use the data upload utility for user interface indicated in [“To upload UPT and UPT-IRM Intersect data to a Siebel CRM database” on page 107.](#)
- 2 Navigate to the folder where you downloaded the utilities.
- 3 Intersect the UPT and IRM files from the file folders where they are stored.
  - To intersect the .csv files from the command prompt, enter the following command:  

```
java -jar IntersectUPTMrg.jar /u [CSV files folder path] /m [IRM files folder path] /l compareCSV.log /o [output folder]
```

For example:

```
java -jar IntersectUPTMrg.jar /u C:/UPTFiles /m C:/IRMFiles /l compareCSV.log /o upt_mrg
```
  - To upload from user interface, invoke the data upload utility for user interface and navigate to the IRM tab.
- 4 The utility creates the upt\_mrg folder in the same folder as the .jar of the utility and places the merged files in it.

**NOTE:** These files will be used for further reporting and analysis as outlined in [Chapter 9, “Analytical Reports for UPT and UPT with IRM Intersection.”](#)



# 9

## Analytical Reports for UPT and UPT with IRM Intersection

This chapter includes information about how to view the usage pattern tracking (UPT) and incremental repository merge (IRM) data on the Oracle Business Intelligence Enterprise Edition (OBIEE) environment. It includes the following topics:

- [Analytical Reports for UPT and UPT with IRM Intersect Data on page 112](#)
- [Process of Configuring Reports on page 113](#)

**NOTE:** OBIEE is the default reporting tool used with the report artifacts and catalog provided by Siebel. You can also do similar analysis with any tool of your choice because the UPT load utilities are designed to work with other database and analytical tools as well.

## Analytical Reports for UPT and UPT with IRM Intersect Data

Siebel CRM consists of preconfigured reports that cover analysis of data collected by UPT. In addition, the reports also cover UPT-IRM intersection data and its analysis. Both sets of reports are listed in [Table 13](#).

Table 13. Analytical reports on UPT and UPT with IRM intersect data

| Report                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| UPT - Build wise trending report | This is a dashboard of preconfigured trending reports across various builds and executions of UPT. It helps analyze the increase in or change to test coverage in every build for any given artifact. The trending reports provide analysis on certain metrics captured by UPT and the reports can be enhanced to include other trending data as well. Each report can be drilled down further. You can also filter to compare two or more builds or filter on Build Number or Event Method.                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| UPT Dashboard                    | <p>This is the main dashboard displaying analytic reports in a single view. You can filter the dashboard on one or more build numbers and drill down each report. Some of the salient reports are:</p> <ul style="list-style-type: none"> <li>■ <b>Application User View.</b> Displays count of a given user against any application such as number of times user SADMIN was used to log in to Siebel Communications Application for the test cases for a given build.</li> <li>■ <b>Application Access.</b> Displays count of web login versus number of times a view was activated for various applications.</li> <li>■ <b>Login Across Apps.</b> Displays count of various logins used for running the test cases across various applications.</li> <li>■ <b>Applet Record Action.</b> Displays count of various artifacts such as applications, applet, or views used to run a set of test cases for a given QA execution of test cases.</li> </ul> |



Table 13. Analytical reports on UPT and UPT with IRM intersect data

| Report                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| UPT Graphical Reports  | <p>This dashboard contains graphical reports that can be filtered on build number. Some salient reports are:</p> <ul style="list-style-type: none"> <li>■ <b>Applet Access.</b> Displays the number of times a given applet was accessed across test cases.</li> <li>■ <b>Applet Displayed.</b> Displays the number of times a given applet was displayed and limits the report to applets that were displayed more than 500 times.</li> <li>■ <b>Applet with Invoke Method.</b> Displays count of the number of times the invoke method for applets was used along with names of applets.</li> </ul> |
| UPT - IRM Intersection | <p>This dashboard is the intersection of IRM with UPT. It provides details on:</p> <ul style="list-style-type: none"> <li>■ Repository artifacts that are new or modified and also used by a customer. This report can be filtered on the applications used by the customer.</li> <li>■ Schema changes and workflow processes that are new or modified for a given upgrade path. These two artifacts are for the complete set of applications that Siebel supports and are not limited to any one application.</li> </ul>                                                                             |

## Process of Configuring Reports

This process helps you obtain prebuilt reports on uploaded UPT data and UPT-IRM intersected data. You can also create your own custom reports. The main benefit of projecting the uploaded data as reports is to aid in decision making on the objects that need to be further tested or developed.

For information on how the data is uploaded, see [Chapter 8, “Upload of UPT and UPT-IRM Intersect Data.”](#)

To view the UPT and IRM data uploaded to the Siebel CRM database (see [Chapter 8, “Upload of UPT and UPT-IRM Intersect Data”](#)) on the OBIEE environment, perform the following tasks:

- 1 “Installing OBIEE” on page 114
- 2 “Creating a Data Source Name (DSN)” on page 114
- 3 “Generating the Report from the RPD File” on page 114
- 4 “Viewing the UPT Reports” on page 115

## Installing OBIEE

To view the pre-built reports based on the .csv files in the database, you must install OBIEE. For more information, see *Installing Oracle Business Intelligence*.

**NOTE:** You can also run custom reports using OBIEE or any other tool.

## Creating a Data Source Name (DSN)

Create a DSN for the database chosen for UPT reports.

**NOTE:** The 64-bit DSN driver compatible with OBIEE is DataDirect 7.1.4 Oracle Wire Protocol.

## Generating the Report from the RPD File

Use this procedure to generate the report.

### *To generate the report from the RPD file*

- 1** Download the catalog and rpd files.
  - a** Download UPT.catalog and UPT.rpd from the server common folder packaged with Siebel CRM to any folder on your local or remote machine.
  - b** Run the admintool.cmd utility from:  
C:\Oracle\Middleware\bi\bitools\bin\  
  
**NOTE:** For UNIX, the utility is admintool.sh
- 2** Edit the rpd file.
  - a** Navigate to File, Open, and then the Offline menu item to open UPT.rpd.  
  
**NOTE:** The temporary password to open the file is Siebel@123. Please change the password after initial login.
  - b** Expand UPT in the Physical window.
  - c** Right-click Connection Pool and select Properties.
  - d** Update DSN, User Name, and Password.
  - e** Click OK.
  - f** If you want to verify if your setting is correct, right-click the S\_USER\_EVENT table and then click Update Row Count.  
  
If this update today's date, the connection is successful.
  - g** Save your changes upon exit.  
  
**NOTE:** Fix errors, if any, upon exit. You can ignore warnings.
  - h** Run the data-model-cmd.cmd utility, located in the OBIEE server, at:

\ORACLE\_HOME\bi\modules\oracle.bi.commandline.tools\scripts

**NOTE:** For UNIX, the utility is `data-model-cmd.sh`

- 3 Upload UPT.rpd from the command prompt by entering the following command:

```
data-model-cmd.cmd uploadrpd -I <RPD location> -W <RPD password> -SI ssi -U <OBIEE user login> -P <OBIEE user password> -S <OBIEE server name> -N 9502
```

For example:

```
data-model-cmd.cmd uploadrpd -I C:\UPT.rpd -W Siebel@123 -SI ssi -U weblogic -P welcome1 -S xyz01mrc.us.abc.com -N 9502
```

**NOTE:** Ensure the Java path is set before you start upload.

## Viewing the UPT Reports

The report reflects values such as the direct and indirect changes to repository objects to aid in analytics and decision making. For more information on these changes, see [Chapter 8, "Upload of UPT and UPT-IRM Intersect Data."](#) You can view other prebuilt report or create custom reports as well. To improve OBIEE performance and refresh of data, read about caching in *Installing Oracle Business Intelligence*.

Use this procedure to view the reports.

### To view the UPT reports

- 1 Log in to OBIEE as Administrator.
- 2 Navigate to Catalog, My Folder, and then the Task menu item.
- 3 Click Unarchive.
- 4 Select UPT.catalog and then click OK to upload the file.
- 5 This creates the UPT folder under My Folder.
- 6 Navigate to the UPT-IRM Intersection report.



# 10 Creating and Administering iHelp

This chapter includes information about administering iHelp. It includes the following topics:

- [About iHelp on page 117](#)
- [Scenario for Administering iHelp on page 117](#)
- [Process of Administering iHelp on page 118](#)
- [Creating iHelp Item Records on page 119](#)
- [Designing iHelp on page 122](#)
- [Clearing the iHelp List Cache on page 124](#)
- [Activating, Revising, and Deactivating iHelp Items on page 125](#)
- [Translating iHelp Items on page 126](#)
- [Importing and Exporting iHelp Items on page 127](#)

## About iHelp

iHelp is real-time step-by-step instruction that helps users complete tasks within the Siebel CRM application. iHelp is best used to provide instruction to first time or occasional users. For information about how to use iHelp, see *Siebel Fundamentals*. For information about Application Deployment Manager (ADM) and iHelp, see *Siebel Application Deployment Manager Guide*.

**NOTE:** iHelp might not be appropriate for enforcing standards because users are free to follow or not follow any step. For information about how to standardize user behavior, see *Siebel Business Process Framework: Task UI Guide*.

## Scenario for Administering iHelp

This topic gives one example of how iHelp administration might be used. You might use iHelp administration differently, depending on your business model.

The agents in training in the North American call centers of a multinational company want step-by-step instructions on how to create activities.

The North American administrator creates an iHelp item to appear in the iHelp pane of the Activities and Accounts screens (screens frequently used by the agents). Because these instructions pertain only to call center agents, this iHelp item is set to be visible only to those users with the Call Center responsibility.

The North American administrator and the call center managers are the only people who modify this iHelp item; the call center managers provide the content of the iHelp steps, and the administrator restricts edit access by associating the Call Center access group with the iHelp item.

Various employees test the iHelp item. When the tests are complete, the administrator activates the iHelp item.

At the end of the month, a policy change occurs that effects some steps in the iHelp item. This policy change is handled by creating two versions of the iHelp item. One item is set to expire at the end of the month and the second item (with steps corrected for the new policy) is set to become active at the beginning of the next month.

In North America, the call centers operate in both English and French. The manager of the francophone call center revises the iHelp item, translating the text into French.

The European call centers use a different database, but they also want their call center agents to see this iHelp item. The North American administrator exports the iHelp item to a file and sends it to the European administrator. Then, the European administrator imports the item into the European database, adds responsibilities and access groups, and activates the iHelp item.

## Process of Administering iHelp

To administer iHelp, complete the following tasks:

- 1 "Creating iHelp Item Records" on page 119
- 2 "Designing iHelp" on page 122
- 3 "Clearing the iHelp List Cache" on page 124
- 4 "Activating, Revising, and Deactivating iHelp Items" on page 125
- 5 "Translating iHelp Items" on page 126
- 6 "Importing and Exporting iHelp Items" on page 127

## Creating iHelp Item Records

The first task in creating iHelp items is to create the iHelp item record.

In this task, you determine the following for the iHelp item:

- In which Siebel Business Applications the iHelp item appears
- In which screens the iHelp item appears
- Which users can see the iHelp item
- Which administrators can modify the iHelp item
- (Optional) Activation and expiration dates for the iHelp item
- If the iHelp item is downloaded to remote and local databases

You can create iHelp items in several ways. You can import and export the items, or you can manually create the items. If you manually create the items, then make sure that you test your iHelp items in either of the following ways:

- Create and test your iHelp item in the intended production environment. While you test, restrict the responsibilities associated with the iHelp item to restrict visibility of the item. For more information, about how to restrict responsibilities, see the following task about how to create an iHelp item record.
- Create and test your iHelp item in your development environment, then use ADM to deploy the item to production. For information about ADM and iHelp, see *Siebel Application Deployment Manager Guide*.

You can determine the database tables that store the data that you create in iHelp views. On the Administration - iHelp screen, navigate to a view, select Help from the application-level menu, then About View, and note the business components for the view. In Siebel Tools, the database table name appears in the Table column for a business component.

If you use the Applet Wizard to create an applet, then the HTML Type field for the controls and list columns is automatically set to Text. If you are using iHelp, then change the HTML Type field to Field.

This task is a step in [“Process of Administering iHelp” on page 118](#).

### To create an iHelp item record

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.

## 2 Create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field              | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name               | <p>Type the name that appears in the iHelp pane. Make sure that the name clearly identifies the iHelp item.</p> <p>Do not include any special characters such as colons or quotation marks in the Name.</p>                                                                                                                                                                                                                                               |
| Remote Support     | <p>Select a value to determine if items are downloaded. iHelp items can be downloaded to regional and local databases. Value include:</p> <ul style="list-style-type: none"> <li>■ <b>All.</b> Items are downloaded to both regional and local databases.</li> <li>■ <b>Regional.</b> Items are downloaded to regional databases only.</li> <li>■ <b>None.</b> Items are not downloaded to any databases.</li> </ul>                                      |
| Application        | <p>Select the Siebel Business Applications in which you want the iHelp item to appear. For example, if you want the iHelp item to be used in Siebel Call Center, then set this field to Siebel Universal Agent (the internal name for the Call Center application).</p> <p>Make sure that all these Siebel Business Applications contain the screens and views needed for the iHelp item that you create.</p>                                             |
| Related Task       | <p>Select a task to which you want to link from the iHelp item. If you select a value in this field, then colored text appears in the iHelp item to indicate that you can use the task-based UI for this task.</p> <p>You cannot pass the current UI context to a related task. For example, if the user has selected a contact, and selects an add activity task from iHelp, then you cannot pass the selected contact to the Activities form.</p>       |
| 'Show Me' Location | <p>Type the location of a file or a URL to open when a user clicks the Show me more link at the end of the iHelp item. If you type the location of a file in this field, then you must specify a relative path. If you type a URL, then you must use the HTTP protocol. You must also specify the protocol in the URL (include http://).</p> <p>If you do not type a value in this field, then a Show me more link does not appear in the iHelp item.</p> |
| Private            | <p>Clear the check box to indicate any user with access to the Administration - iHelp screen can modify the iHelp item. If you want to restrict edit access for this iHelp item, then see <a href="#">Step 5 on page 121</a>.</p>                                                                                                                                                                                                                         |
| Activation Date    | <p>(Optional) Select the date when the iHelp item first appears in the iHelp pane.</p>                                                                                                                                                                                                                                                                                                                                                                    |
| Expiration Date    | <p>(Optional) Select the date after which the iHelp item no longer appears in the iHelp pane.</p>                                                                                                                                                                                                                                                                                                                                                         |



| Field       | Comments                                                                                                                                            |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Status      | Displays the status of the iHelp item. The status changes when the Activate, Revise, and Deactivate buttons on the All Help Items view are clicked. |
| Version     | Displays the version of the iHelp item. This field is automatically updated when an item of the same name is created or imported.                   |
| Description | (Optional) Type a description of the iHelp item. This description is for only the administrator. The text does not appear in the iHelp pane.        |

- 3 Set which users can see the iHelp items (in the iHelp pane or Map) by completing the following steps:

- a Navigate to the Responsibilities view.
- b Associate the responsibilities of those users who you want to see the iHelp item.
- c Make sure the Active flag is selected for each responsibility.

**NOTE:** Users also must have the Task Assistant Player View associated with at least one of their responsibilities. For more information about how to associate views and responsibilities with users, see *Siebel Security Guide*.

- 4 Specify the locations in the Siebel application where you want the iHelp item to appear.

When you specify a location, you specify a combination of screens, business objects, and views. iHelp items are mapped to business objects. Business objects are often uniquely associated with a particular screen, but there are some exceptions. For example, business object home pages do not have this unique relationship. If you want an iHelp item to appear on both the Activities Home Page and other views under the Activities screen, then you must associate both of the following business objects with the iHelp item:

- Action Home
- Action

To specify the locations in the UI where you want the iHelp item to appear, perform the following steps:

- a Navigate to the Screens view.
- b Create a new record, and select a combination of screens, business objects, and views where you want the iHelp item to appear.

You can select only a combination of screens, business objects, and views, which is common to all the Siebel Business Applications specified in the Application field.

- 5 If you want to restrict edit access for the item, then set the access groups to determine who can modify the iHelp item by completing the following steps:

- a Navigate to the Access Groups view.
- b Associate access groups with the iHelp item.

Make sure that you belong to one of the access groups.

- c Navigate to the More Info view, and select the Private check box in the form view.  
For more information about access groups, see *Siebel Security Guide*.

## Adding Additional Help Topics to an iHelp Item

Complete the following procedure to add additional help topics to an iHelp item.

### *To add additional help topics to an iHelp item*

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2 Select the iHelp item you want to work with, and then navigate to the Related iHelp view.
- 3 Create a new record on the Related iHelp form, select an iHelp item from the iHelp Item dialog box, and click OK.

You can use the numbers in the Order field for each help topic to specify the order in which the help topics appear in the iHelp item.

# Designing iHelp

Assemble step-by-step iHelp instructions in the iHelp Designer by creating steps and connecting them with branches.

This task is a step in [“Process of Administering iHelp” on page 118](#).

## Creating an iHelp Step

Complete the following procedure to create an iHelp step.

### *To create an iHelp step*

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2 Drill down on the Name field of the iHelp item.
- 3 In the iHelp Designer, drag the Step or Start icon onto the grid.

The first step in any iHelp must be Start. The start step navigates the user to the correct view for the iHelp item. Only one Start step is allowed for each iHelp item.

- 4 In the Step form, complete the necessary fields.

Some fields are described in the following table.

| Field         | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name          | Type the name that appears on the step's icon in the iHelp Designer. The user does not see this name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| View          | <p>Select a view name if you want the step to:</p> <ul style="list-style-type: none"> <li>■ Provide a hyperlink to a view.</li> <li>■ Highlight buttons or fields on the view.</li> </ul> <p><b>NOTE:</b> If you provide a hyperlink to a screen that is different from the main screen for the iHelp, then you might lose record context as you navigate to the other screen. For example, a user in the Contact Activities view of the Contacts screen, highlights an activity record and clicks an iHelp link to the Activities screen. In going to the Activities screen, the record context is broken. The highlighted activity is no longer selected, and the user must query for it again. If you remain in the same screen, then context is generally maintained.</p> <p>Only views that are common to all the Siebel Business Applications specified in the Application field are available for selection.</p> |
| Caption       | <p>Type the text that appears in the step. Use the following tags to format step captions:</p> <ul style="list-style-type: none"> <li>■ <code>&lt;b&gt;</code> and <code>&lt;/b&gt;</code> for bold.</li> <li>■ <code>&lt;i&gt;</code> and <code>&lt;/i&gt;</code> for italics.</li> <li>■ <code>&lt;u&gt;</code> and <code>&lt;/u&gt;</code> for underline.</li> <li>■ <code>&lt;v&gt;</code> and <code>&lt;/v&gt;</code> for view navigation links. If you add these tags to text, then the text appears in bold and blue, and has an underline when you point to the text.</li> <li>■ <code>&lt;a&gt;</code> and <code>&lt;/a&gt;</code> for external hypertext links. For example, <code>&lt;a href="http://www.oracle.com" target="_blank"&gt;Oracle&lt;/a&gt;</code>. If you add these tags to text, then the text appears in bold and blue, and has an underline when you point to the text.</li> </ul>          |
| Section Label | (Optional) Type the section label that appears above the step text in bold, underlined text.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Description   | (Optional) Type information for only the administrator's use. This description is not visible in the iHelp pane.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

- 5 (Optional) Highlight a button or field by completing the following steps:
- Click the Field and Button Highlights folder.
  - In the Field and Button Highlights list, create new records and complete the necessary fields.
- 6 (Optional) Create substeps by completing the following steps:

- a** Click the SubSteps folder.
- b** In the SubSteps list, create new records, and complete the Caption field.

If you add substeps to a step, then an arrow appears at the end of the step caption. Click this arrow to show the substeps. Click the arrow again to hide the substeps.

**NOTE:** You cannot add view navigation links to substeps.

## Connecting Steps With Branches

Complete the following procedure to connect steps with branches.

### *To connect steps with branches*

- 1** Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2** Drill down on the Name field of the iHelp item.
- 3** In the iHelp Designer, drag the Branches icon onto the grid.
- 4** Move the end points of the branch to connect two steps.
- 5** If multiple branches leave one step, then set conditions on the branches by completing the following steps:
  - a** Click the Branches folder for the step.
  - b** In the Branches list, complete the necessary fields.

No Condition Expression is required for the last branch in the sequence. For information about the Branch Condition Expression Designer, see *Developing and Deploying Siebel Business Applications*.

## Clearing the iHelp List Cache

iHelp loads all iHelp items to the iHelp Map and iHelp pane when the Siebel application is initialized. When you modify iHelp items, you might have to clear the iHelp List Cache before you can see changes to the iHelp item (in the iHelp pane).

This task is a step in ["Process of Administering iHelp" on page 118](#).

### *To clear the iHelp List Cache*

- 1** Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2** Click the cogwheel icon, and select Clear iHelp List Cache.

## Activating, Revising, and Deactivating iHelp Items

The Activate, Revise, and Deactivate buttons control:

- The status of the iHelp items
- Whether the items are visible in the iHelp pane and iHelp Map
- Whether the items can be edited

Table 14 describes the behavior of these buttons.

Table 14. About the Activate, Revise, and Deactivate Buttons

| Button     | When to Use                                              | Effect                                                                                                                                                                                                                                                  | Changes Status From... | To...       |
|------------|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------------|
| Activate   | The iHelp item is complete and ready for general use.    | <p>The iHelp item cannot be modified (although it can be deleted).</p> <p>The status and version no longer appear with the item name in the iHelp pane.</p> <p>After the status changes to Active, any active version of the item becomes Outdated.</p> | In Progress            | Active      |
| Revise     | You want to make changes to an active iHelp item.        | <p>The iHelp item is copied to a new record that can be edited.</p> <p>For the new record, deselects Active flag on Responsibilities view.</p>                                                                                                          | Active<br>Inactive     | In Progress |
| Deactivate | You no longer want the item to appear in the iHelp pane. | The iHelp item no longer appears in the iHelp pane or the iHelp Map.                                                                                                                                                                                    | Active                 | Inactive    |

This task is a step in [“Process of Administering iHelp” on page 118](#).

### To activate an iHelp item

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2 Select an in-progress iHelp item.
- 3 Click Activate.

## Revising an Active iHelp Item

Complete the following procedure to revise an active iHelp item.

### *To revise an active iHelp item*

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2 Select an active iHelp item.
- 3 Click Revise.

**TIP:** Reset the responsibilities for the in-progress iHelp item so that you can see and test the item that you are revising.

## Deactivating an iHelp Item

Complete the following procedure to deactivate an iHelp item.

### *To deactivate an iHelp item*

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2 Select an active iHelp item.
- 3 Click Deactivate.

# Translating iHelp Items

When translating an iHelp Item, only the text strings that the user sees are translated. These text strings are:

- Item name
- Section labels
- Step captions
- Substep captions

If translation is not defined for a language, then the text from the base record appears.

This task is a step in [“Process of Administering iHelp” on page 118](#).

### *To translate an iHelp item*

- 1 Navigate to the Administration - iHelp screen, then the Translations view.
- 2 In the iHelp Items list, select an iHelp item.

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

| Field        | Comments                                                         |
|--------------|------------------------------------------------------------------|
| Display Name | Type the display name for the translation of the iHelp item name |

- 4 Navigate to the Designer view.
- 5 For each step, complete the following steps:
- a Open the Translations folder.
  - b Create a record to the Translations list and complete the necessary fields.
- 6 For each substep, complete the following steps:
- a Open the Translations folder for the substep.
  - b In the Translations list, create a new record, and complete the necessary fields.

## Importing and Exporting iHelp Items

iHelp items can be exported and imported as XML files.

Export and import iHelp items to:

- Move iHelp items from one database to another database, for example when upgrading.
- Create backups of iHelp items.

You cannot move iHelp items between different types of Siebel repositories. For example, you cannot export from a Siebel Call Center application to a Siebel Automotive application. In general, make sure that all the Siebel Business Applications, screens, and views referenced in the exported item are available in the repository where the item is imported.

This task is a step in [“Process of Administering iHelp” on page 118](#).

### *To export an iHelp item as an XML file*

- 1 Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2 In the iHelp Items list, select an iHelp item.  
**NOTE:** Make sure that the name of the item does not contain any special characters such as colons or quotation marks.
- 3 Click the cogwheel icon, and select Export iHelp Item Definition.

### Importing an iHelp Item

Complete the following procedure to import an iHelp item.

***To import an iHelp item***

- 1** Navigate to the Administration - iHelp screen, then the All iHelp Items view.
- 2** Click the cogwheel icon, and select Import iHelp Item Definition.
- 3** Browse for the iHelp item XML file and click Import.

If an iHelp item of the same name already exists, then the imported iHelp item is imported as a new version of the item.

After import, the iHelp Items list is filtered to show only the newly imported item.

**NOTE:** Responsibility information and access group information are not exported or imported.



# 11 Alerts

This chapter explains the procedures necessary to create alerts for Siebel Business Applications. It includes the following topics:

- [About Alerts on page 129](#)
- [Scenario for Using Alerts on page 129](#)
- [Creating Alerts on page 130](#)

## About Alerts

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

For example, to communicate product pricing changes to a sales team with members around the world, a sales manager wants to be able to distribute new pricing structures and product information when they are approved. Traditionally, this distribution is done with email messages, phone calls, or mailed literature. This approach presents the following challenges:

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

Features of alerts include the following:

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

## Scenario for Using Alerts

This topic gives one example of how alerts might be used. You might use alerts differently, depending on your business model.

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

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

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

When the Siebel administrator sends the alert, a customized message is sent to all international sales representatives, with the appropriate price list for their division associated. The sales representatives see the alert message on their home pages when they log in to the Web client or download alerts during synchronization. These users can navigate through the home page or Site Map to read the text and any associated literature items or products.

After sending the alert to the sales force, the Siebel administrator continues with other work. The Human Resources director has requested that employees be sent a weekly alert for the next month, reminding them to attend a benefits information session. The Siebel administrator creates this Human Resources alert, using the same process she used to create the sales force alert, but, instead of sending it as a single-message alert, she designates it to recur at weekly intervals.

## Creating Alerts

When you create an alert, all designated connected users receive the alert at the date and time the alert is activated. Mobile users, such as sales field representatives, receive an activated alert after synchronization.

### *To create an alert*

- 1 Navigate to the Administration - Alert screen, then the Alerts view.
- 2 In the Alerts list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field    | Comments                                                                                                                                                                                                            |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Priority | Select the priority of the message. The priority of the message determines where the message appears in the list of alerts on the users' home pages. Messages with the highest priority are at the top of the list. |
| Keyword  | Type the keywords that the user searches on to find this message.                                                                                                                                                   |

| Field          | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type           | <p>Select a value to determine who receives the alert, as follows:</p> <ul style="list-style-type: none"> <li>■ Employee Home Page Alert. Displays the alert on all employees' home pages.</li> <li>■ Partner Alert. Displays alerts to employees of registered partner companies.</li> <li>■ Program Information. Displays the alert to self-registered, individual partners.</li> <li>■ Public Information. Displays the alert to unregistered, anonymous users.</li> </ul>                                                                             |
| Abstract       | Type a brief abstract that summarizes the message. This field appears as a hyperlink on the appropriate users' home pages.                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Activation     | Select the date when the message first appears to users.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Expiration     | Select the date when the message no longer appears to users.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Partner Alert  | Select the check box to indicate that the alert is seen by users in partner companies.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Employee Alert | Select the check box to indicate that the alert is seen by employee users.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| All Users      | <p>Select this check box to indicate the alert is seen by all users, as indicated by the Employee Alert or Partner Alert check boxes.</p> <p>For example, if the Employee Alert check box is checked, and the All Users check box is checked, then all employees see the alert.</p>                                                                                                                                                                                                                                                                       |
| Message Body   | <p>Type in the text of the message, including HTML formatting code if needed.</p> <p>Alerts can be enhanced by using the following HTML formatting codes:</p> <ul style="list-style-type: none"> <li>■ <code>&lt;b&gt;text&lt;/b&gt;</code> for bold</li> <li>■ <code>&lt;u&gt;text&lt;/u&gt;</code> for underline</li> <li>■ <code>&lt;i&gt;text&lt;/i&gt;</code> for italics</li> <li>■ <code>&lt;h4&gt;text&lt;/h4&gt;</code> for font size</li> <li>■ <code>&lt;a&gt;href="http:text"&lt;/a&gt;</code> for a hyperlink to Web page or site</li> </ul> |
| Preview        | Displays the message as it appears to users.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

- 3 Drill down on the Abstract field in the new record.
- 4 If you want to add literature as an attachment, then complete the following steps:
  - a Navigate to the Literature view.
  - b In the Literature list, create a new record for the literature item.

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

- 5** If you want to add a product as an attachment, then complete the following steps:
  - a** Navigate to the Product view.
  - b** In the Product list, create a new record for the product.
- 6** If you want to specify the recipients, then complete the following steps:
  - a** Navigate to the Recipients view, then the Recipient Divisions or Recipient Positions view.
  - b** Create new records to the Recipient List.

Remember, if you select the All Users check box in [Step 2](#), then the message is automatically sent to all recipients.

# 12 Administering and Using Inbox

This chapter contains information about the Inbox, how users use the Inbox, and how administrators can make changes to the Inbox types that are already configured. It includes the following topics:

- [About the Inbox on page 133](#)
- [Scenarios for Administering and Using the Inbox on page 135](#)
- [Process of Administering the Inbox on page 136](#)
- [Reviewing All Inbox Items on page 137](#)
- [Deleting Inbox Items on page 137](#)
- [Setting Expiration Dates and Due Dates for Inbox Items on page 138](#)
- [Changing the Destination View for an Inbox Type on page 138](#)
- [Changing Inbox Downloading to Remote Databases on page 139](#)
- [Adding Inbox Translations on page 139](#)
- [Process of Using the Inbox on page 140](#)
- [Taking Action on Inbox Items on page 140](#)
- [Reviewing Completed Items on page 140](#)
- [Reviewing Submitted Items on page 141](#)

## About the Inbox

The goals of the Inbox are to provide users with:

- A single screen that shows all approval and notification items assigned to them regardless of the screen where the item originated.
- Enough detailed information about the item so that users can act on the item from the Inbox and not have to navigate to other screens for more information.

Table 15 lists some terminology used in this chapter.

Table 15. Inbox Terminology

| Term                   | Definition                                                                                                                                                                                                                                                                                    |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inbox item             | Requests for approval and notification that are delivered to in Inboxes of users. Inbox items refer to other records, or to feature objects in the Siebel database that require review or approval.<br><br>The term <i>Inbox item</i> is shortened to <i>item</i> in some text in this guide. |
| Deactivated Inbox item | An Inbox item that has been processed or has expired. The item no longer appears in the Inbox Items List view.                                                                                                                                                                                |
| Inbox screen           | A screen in which users can perform the following tasks: <ul style="list-style-type: none"> <li>■ Take action on their current Inbox items.</li> <li>■ View their completed items.</li> <li>■ View their submitted items.</li> </ul>                                                          |
| Inbox Items List       | A view that displays Inbox items on which the user must act.                                                                                                                                                                                                                                  |
| Submitted Items List   | A view that displays deactivated Inbox items that have been submitted by the user.                                                                                                                                                                                                            |
| Completed Items List   | A view that displays deactivated Inbox items. Typically, the approval process is complete for these items.                                                                                                                                                                                    |
| Inbox action           | The action that the user takes on the Inbox item. Typically, this action is approval, rejection, or acknowledgement.                                                                                                                                                                          |
| Inbox type             | A value that determines some characteristics of the Inbox item, such as the actions that can be taken on the item, and the expiration date for the item.                                                                                                                                      |
| Destination view       | A view that displays data from the feature object and that you access by drilling down on the Name field.                                                                                                                                                                                     |
| Feature object         | The underlying entity that the Inbox record points to; for example, a service request record or, for ESS, a row in the SmartScript session table. When you drill down on the Name field of an item in the Inbox, you see the feature object.                                                  |
| ESS                    | The Siebel Employee Self-Service application. The Inbox is an important feature for this application. When this guide provides ESS-specific information, the information is noted as ESS-specific.                                                                                            |
| Universal Inbox        | A term that is an alternative name for the Inbox.                                                                                                                                                                                                                                             |

## How the Inbox Interacts with the Feature Objects

Inbox items contain references to the feature objects.

Feature objects interact with Inbox items through the methods of the Universal Inbox business service. These methods can be invoked using various mechanisms, for example, run-time events can monitor the business component operations of the feature object.

The Inbox interacts with feature objects through Inbox actions that are defined as part of the Inbox type. Integration business service methods are invoked when the users take action on Inbox items. [Figure 1](#) illustrates interaction between feature objects and the Inbox.

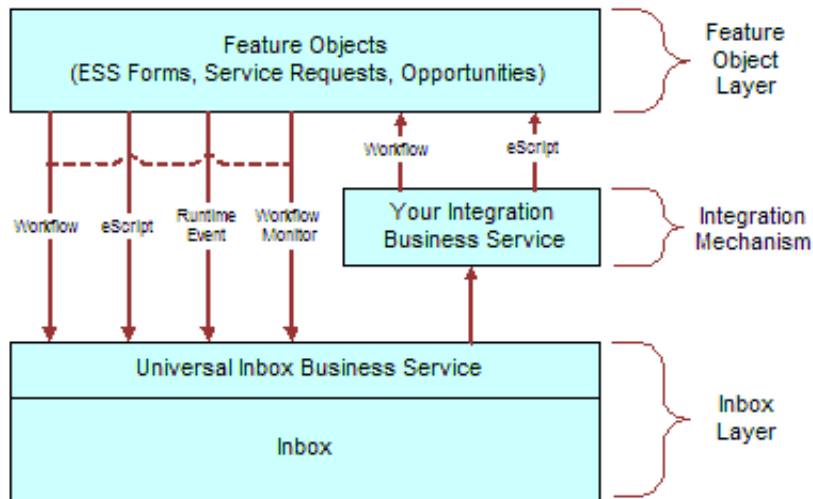


Figure 1. How Inbox Interacts with Feature Objects

## About the Universal Inbox Business Service

The Universal Inbox business service is the interface between the underlying feature object and the Inbox items. Universal Inbox business service methods handle creation, update, deactivation, and deletion of Inbox items. For information about the methods in Universal Inbox business service, see ["Universal Inbox Business Service Methods" on page 154](#).

**CAUTION:** Do not interact with the Inbox through any channel other than the Universal Inbox Business Service.

## Scenarios for Administering and Using the Inbox

This topic describes how the inbox might be used. You might use the inbox differently, depending on your business model. The examples provided in this topic apply to an approval process. However, similar logic applies to other items such as notification. This topic includes the following scenarios:

- ["Managing Service Requests" on page 136](#)
- ["Approving Personnel Action Forms Requests Captured Using ESS" on page 136](#)

### Managing Service Requests

An organization has implemented an automated Inbox assignment and escalation policy for service requests. According to this policy, service requests are assigned using the area, and an Inbox item is created to notify the service request owner of each assignment. An Inbox item is also created for the manager of the service request owner. The item is created using the priority of the service request. The Inbox was configured when the Siebel application was initially rolled out, but this recent change in policy requires the administrator to perform some tasks.

The administrator changes the replication-level feature, which is currently set to Regional. The administrator changes the setting so that the Inbox items are downloaded to both regional and local databases.

In addition, the policy has to be implemented in Japanese installations, so the administrator adds the appropriate language translation.

Previous Inbox items have remained in the Inbox for too long, so the administrator reduces the item expiration period.

Finally, the administrator adds a new drill-down destination view for certain users who do not have access to the standard Service Request views.

### Approving Personnel Action Forms Requests Captured Using ESS

The Human Resources (HR) manager at a company has outlined new personnel action policies for employees. Management has mandated that personnel change requests be filed electronically. Approvals are required in the following sequence:

- 1 A HR representative for the department in which the employee works
- 2 The immediate supervisor of the employee
- 3 The departmental vice president

This new policy is assigned to a Siebel administrator for implementation.

After using the Employee Self-Service feature to set up and activate the integrated Personnel Action Form (PAF), the administrator designs the approval flows for the business object using Siebel Business Process (Workflow) Administration. Using the Inbox, the administrator creates the required approval type. When a user submits this particular item, the approval type created by the administrator invokes the approval workflow process.

A manager at the company submits a PAF. The form is routed to the human resources representative, then the manager, and finally the vice president. Each approver can reject the form and send it back to the requestor. If approved, then the process flow results in an update of data fields.

## Process of Administering the Inbox

To administer the Inbox, perform the following tasks:

- [“Reviewing All Inbox Items” on page 137](#)
- [“Deleting Inbox Items” on page 137](#)



- [“Setting Expiration Dates and Due Dates for Inbox Items” on page 138](#)
- [“Changing the Destination View for an Inbox Type” on page 138](#)
- [“Changing Inbox Downloading to Remote Databases” on page 139](#)
- [“Adding Inbox Translations” on page 139](#)

This topic includes some of the straightforward changes that the administrator can make to the Inbox types that have already been configured. For detailed information about how to set up and configure Inbox, see [Chapter 13, “Configuring the Inbox.”](#)

## Reviewing All Inbox Items

Administrators can view all the Inbox items. They can also take action on any Inbox item.

This task is a step in [“Process of Administering the Inbox” on page 136.](#)

### *To review all items*

- 1 Navigate to the Administration - Inbox screen and one of the following views:
  - **All Inbox Items.** All items that are in users' Inbox Items Lists. The administrator sees one record for each owner.
  - **All Completed Items.** All items that are in users' Completed Items Lists. The administrator sees one record for each owner.
  - **All Submitted Items view.** All items that are in users' Submitted Items Lists. The administrator sees one record for each originator.
- 2 Navigate to the Detail view to see information about the feature object.
- 3 Navigate to the History view to see who owns the item and which owners have taken action on the item.

## Deleting Inbox Items

The administrator can delete Inbox items in the All Submitted Items view. When an item is deleted, the item is deleted for all owners and for the user who submitted the item.

This task is a step in [“Process of Administering the Inbox” on page 136.](#)

### *To delete Inbox items*

- 1 Navigate to the Administration - Inbox screen, then the All Submitted Items view.
- 2 Delete Inbox records as required.

## Setting Expiration Dates and Due Dates for Inbox Items

Each Inbox item that is created is associated with an Inbox type. Fields in the Inbox type record determine the expiration and due dates for items of that type.

This task is a step in [“Process of Administering the Inbox” on page 136](#).

### *To change how item expiration and due dates are set for Inbox items of a type*

- 1 Navigate to the Administration - Inbox screen, then the All Inbox Types view.
- 2 In the Inbox Types list, select a record, and edit the fields in the following table.

| Field                           | Comments                                                                                                                                                                                                                                                      |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Default Queue Duration (Days)   | Type a value that represents the number of days for the default queue duration. This field determines the due date for the item. When the item has been in the Inbox of the owner for more than this number of days, the Past Due check box appears selected. |
| Item Expiration Duration (Days) | Type a value that represents the number of days for the item time expiration. This field determines the expiration date for the item. This field appears in the Submitted Items List view. By default, no action is taken when an item expires.               |

## Changing the Destination View for an Inbox Type

If the Inbox item is set up to access a particular view by drilling down on the Name field, then you can change this destination view or add a new destination view. For example, if some users do not have responsibilities to see the current destination view, then you can add a destination view that they can see.

Multiple views can be associated with one Item type. Each view is assigned a sequence number. When users drill down on an Inbox item, the view that appears is the first view in the sequence that they have access to. Their responsibilities determine this view.

This task is a step in [“Process of Administering the Inbox” on page 136](#).

## Changing Inbox Downloading to Remote Databases

Inbox items can be set to download to regional and local databases. If your Inbox type is currently configured to download to remote databases, then you can change this setting.

**NOTE:** If your Inbox type is not currently set to download to remote databases, then you can configure the inbox for use with remote databases. For more information, see [“Configuring the Inbox for Use with Remote Databases” on page 150](#).

This task is a step in [“Process of Administering the Inbox” on page 136](#).

### *To change remote downloading for an Inbox type*

- 1 Navigate to the Administration - Inbox screen, then the All Inbox Types view.
- 2 Select the Inbox type.
- 3 In the More Info form, edit the Replication Level.

Values include:

- **All.** Downloads the Inbox items to the regional and local databases.
- **Regional.** Downloads the Inbox items to the regional databases only.
- **None.** Does not download items to the remote databases.

**NOTE:** If the Replication Level is currently set to None, then before you change the Replication Level, see [“Configuring the Inbox for Use with Remote Databases” on page 150](#).

## Adding Inbox Translations

If you have a multilingual Siebel application, and the Inbox is not currently supporting all languages, then you can use the Translations view to extend language support.

Create a translation record for each language supported in your multilingual application.

This task is a step in [“Process of Administering the Inbox” on page 136](#).

### *To set up an Inbox translation*

- 1 Navigate to the Administration - Inbox screen, then the All Inbox Types view.
- 2 Select the Inbox item, and navigate to the Translations view.
- 3 In the Translations list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field        | Comments                                                          |
|--------------|-------------------------------------------------------------------|
| Display Name | Type the display name for the translation of the Inbox Type name. |

## Process of Using the Inbox

To use the Inbox, perform the following tasks:

- [“Taking Action on Inbox Items” on page 140](#)
- [“Reviewing Completed Items” on page 140](#)
- [“Reviewing Submitted Items” on page 141](#)

## Taking Action on Inbox Items

Users can take action on items that are sent to them for approval. The most typical actions are to approve, reject, and acknowledge items. The actions available to the user are determined by the Inbox type of the item.

This task is a step in [“Process of Using the Inbox” on page 140](#).

### *To approve or reject an Inbox item*

- 1 Navigate to the Inbox screen, then the Inbox Items List view.
- 2 From the visibility filter, select My Inbox Items or My Team's Inbox Items.
- 3 In the Inbox Items list, select the item that you want to approve or reject.  
**NOTE:** You can drill down on the Name field to review the feature object.
- 4 In the Action field, select the appropriate action, for example, Approved.
- 5 (Optional) In the Comments field, enter a brief explanation.

When the record is saved, the business service and method defined in the Inbox type for the action are triggered.

## Reviewing Completed Items

The History view lets users track the progress of the items through each stage of the approval process. For example, managers can review the approval decision and comments made by each approver.

This task is a step in [“Process of Using the Inbox” on page 140](#).

### *To review items that have been previously approved*

- 1 Navigate to the Inbox screen, then the Completed Items List view.
- 2 From the visibility filter, select My Completed Items or My Team's Completed Items.
- 3 In the Completed Items List, select the item that you want to review.
- 4 Drill down on the Name field to review the feature object.

## Reviewing Submitted Items

Users can review the Inbox items that they have submitted. They can check the progress of an item, for example, to see who has approved the item and who has not.

This task is a step in ["Process of Using the Inbox" on page 140](#).

### ***To review submitted items***

- 1 Navigate to the Inbox screen, then the Submitted Items List view.
- 2 From the visibility filter, select My Submitted Items or My Team's Submitted Items.
- 3 Review the Inbox items that you, or your team, have submitted.



# 13 Configuring the Inbox

This chapter contains information about configuring the Inbox. It includes the following topics:

- [Process of Setting Up and Configuring Inbox on page 143](#)
- [Planning for Inbox Configuration on page 143](#)
- [Creating Inbox Items on page 144](#)
- [Creating Inbox Types on page 145](#)
- [Setting Up Inbox Links to Views and SmartScripts on page 146](#)
- [Setting Up Inbox Actions on page 147](#)
- [Configuring the Inbox for Use with Remote Databases on page 150](#)
- [Setting Up Inbox Approval Translations on page 151](#)
- [Configuring the Toggle Applets for Inbox Views on page 152](#)
- [Configuring the Category Icon for the Inbox on page 153](#)
- [Setting the Log File for Troubleshooting on page 154](#)
- [Universal Inbox Business Service Methods on page 154](#)
- [Examples of Inbox Triggers on page 174](#)

## Process of Setting Up and Configuring Inbox

To set up and configure the Inbox, perform the following tasks:

- 1 ["Planning for Inbox Configuration" on page 143](#)
- 2 ["Creating Inbox Items" on page 144](#)
- 3 ["Creating Inbox Types" on page 145](#)
- 4 ["Setting Up Inbox Links to Views and SmartScripts" on page 146](#)
- 5 ["Setting Up Inbox Actions" on page 147](#)
- 6 ["Configuring the Inbox for Use with Remote Databases" on page 150](#)
- 7 ["Setting Up Inbox Approval Translations" on page 151](#)

## Planning for Inbox Configuration

Before you start configuring the Inbox, complete some research and planning.

This task is a step in [“Process of Setting Up and Configuring Inbox” on page 143.](#)

### ***To plan an Inbox Configuration***

- 1 Select the feature object you want to integrate with the Inbox.

For example, Employee Self-Service forms, Service Requests, Opportunities.

- 2 Analyze how the object is currently accessed.

Consider the following questions:

- a Is the object accessed from the UI or from workflow processes? Is the object accessed from one place or many places?
- b How is the object related to other objects? Do other objects depend on the object?
- c What operations do users perform on the object?

- 3 Determine the integration mechanism by considering what must happen to the object after it enters the Inbox.

The types of integration with the Inbox include:

- **Inbound.** It is typically triggered through workflows, eScripts, run-time events, or Workflow Monitor agents.
- **Outbound.** It is typically triggered through workflows and eScripts.

For example, if users access the feature object in other ways besides using the Inbox, then synchronize (inbound) the Inbox with the object's current data. (See [Figure 1 on page 135.](#))

- 4 Consider the following best practices:

- Interact with the Inbox only through the methods in the Universal Inbox business service. Do not edit the Inbox fields directly.
- Do not customize the fields in the Inbox.
- You cannot reactivate an Inbox item after the item has been deactivated for the owner. Instead, you must create a new Inbox item for that owner.

## **Creating Inbox Items**

Inbox items are created by the Universal Inbox business service. Methods for this business service can be called using the following mechanisms:

- Workflows
- Workflow Monitor Agent
- eScripting
- Run-time events



The procedure in this topic shows how to configure the Siebel application to have Inbox items created in a certain screen or for a business component.

This task is a step in [“Process of Setting Up and Configuring Inbox” on page 143](#).

### ***To configure the Siebel application to create Inbox items***

- 1** Review the information about the Inbox business service, methods and workflows at the end of this chapter.
- 2** Review the procedures for setting up Inbox types.
- 3** Use one of the methods provided in the list in this topic to call the Inbox business service and create Inbox items.

## **Creating Inbox Types**

Each Inbox item that is created is assigned an Inbox type. The Inbox type sets the following characteristics for the Inbox item:

### ■ Action Type

The action type is the LOV type that determines the actions the user can choose to take on an Inbox.

For example, there are the following LOV records for the UINBOX\_STATUS\_TYPE action type: Approved, Received, and Rejected. These records represent the actions that the user can take on an Inbox item of this type.

**NOTE:** Because the effect of the action is set for each Item type, this LOV type can be used for many Item types, but the effect of approving or rejecting can be different for each Item type.

### ■ Category

The category determines the icon that appears in the Category field for the item in the Inbox. The category field can be useful for querying and sorting Inbox item and Inbox type records. For information about editing the Category icon, see [“Configuring the Category Icon for the Inbox” on page 153](#).

### ■ Replication Level

### ■ Integration Object Name

### ■ Business Object Name

### ■ Item Expiration Duration (Days)

### ■ Default Queue Duration (Days)

### ■ Views and SmartScripts that link to the Inbox item

### ■ Effects of the actions that the user can choose

This task is a step in [“Process of Setting Up and Configuring Inbox” on page 143](#).

**To create an Inbox type**

- 1 Navigate to the Administration - Inbox screen, then the All Inbox Types view.
- 2 In the Inbox Types list, create a new record, and complete the necessary fields in the More Info form.

Some fields are described in the following table.

| Field                           | Comments                                                                                                                                                                                                  |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Replication Level               | Select None if you do not want to download Inbox items to remote databases. Otherwise, see <a href="#">“Configuring the Inbox for Use with Remote Databases” on page 150</a> .                            |
| Integration Object Name         | Select a value if an integration object is associated with the Inbox type. This field has is special logic.                                                                                               |
| Business Object Name            | Select the feature object that the destination view belongs to.                                                                                                                                           |
| Default Queue Duration (Days)   | Type the number of days that the item can stay in the Inbox before the Past Due check box appears selected. This field determines the due date for the item.                                              |
| Item Expiration Duration (Days) | Type the number of days that the item can stay in the Inbox before the item expires. By default, no action is taken when the item expires. The Expiration field appears in the Submitted Items List view. |

## Setting Up Inbox Links to Views and SmartScripts

Administrators can specify that drilling down on the Name field of Inbox items accesses a particular view. Administrators can change the destination view or add a new destination view. For example, if some users do not have responsibilities to see the current destination view, then you can add a destination view that they can see.

You can associate multiple views with an Item type. You assign a sequence number to each view. When users drill down on an Inbox item, the view that appears is the first view in the sequence that they have access to. Their responsibilities determine this view.

You can also specify a SmartScript to run when users drill down on the Name field. SmartScripts are primarily used for ESS integration with Inbox, for example, an ESS Summary Form SmartScript.

This task is a step in [“Process of Setting Up and Configuring Inbox” on page 143](#).

**NOTE:** If you have set a Name Drilldown action, then view records you set up are ignored.

**To set up views and SmartScripts for an Inbox type**

- 1 Navigate to the Administration - Inbox screen, then the All Inbox Types view.
- 2 In the Inbox Types list, select a record, and then navigate to the Views view.
- 3 In the Views list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                                                                                                                                                                                       |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View        | Select the view to appear when users drill down on an Inbox item. Make sure that the view that you enter belongs to the Business Object specified for the Inbox type. For ESS, use the EmpSS Form Player view. |
| Sequence #  | Type a number for the sequence in which to make the view available to the user.                                                                                                                                |
| SmartScript | Select the SmartScript to run in the view.                                                                                                                                                                     |

## Setting Up Inbox Actions

Review the information in the following topics before setting up Inbox actions:

- [“About Actions” on page 147](#)
- [“About Deactivate Item Upon Finish and Deactivate Owners Upon Finish Fields” on page 148](#)

This task is a step in [“Process of Setting Up and Configuring Inbox” on page 143](#).

### About Actions

There are several circumstances where a business service method can be invoked to act on an Inbox item. A different action type is used for each. [Table 16](#) summarizes these actions.

Table 16. Actions for Inbox Types

| Action                | Invokes the Specified Business Service Method When...                                                                                                                                                                                                                                   |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action Field Dropdown | The user takes action (edits the Action field on the Inbox item).                                                                                                                                                                                                                       |
| Name Drilldown        | The user drills down on the Name field of the item. You can also use the Views view to configure this hyperlink. For more information about how to use the Views view to configure this hyperlink, see <a href="#">“Setting Up Inbox Links to Views and SmartScripts” on page 146</a> . |
| Local Validation      | The user, in a remote database, drills down on the Name field of the item. For more information, see <a href="#">“Configuring the Inbox for Use with Remote Databases” on page 150</a> .                                                                                                |

Table 16. Actions for Inbox Types

| Action              | Invokes the Specified Business Service Method When...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initialize          | <p>Do not use this action unless you are upgrading. This action is provided for backward compatibility. For more information, see <i>Siebel Database Upgrade Guide</i>.</p> <p>This action invokes the Initialize method of the Universal Business Service. It creates an Inbox item and starts the defined method.</p>                                                                                                                                                                                                                                                                                                                                                    |
| Transfer            | The user transfers the Inbox item to another user.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Transfer Validation | <p>The user transfers the Inbox item to another user, and the Transferable field for the Inbox Type is selected.</p> <p>In the preconfigured Siebel application, the Transfer action and Transfer Validation action are implemented only for task inbox items (the Task business object). These actions invoke the Transfer method of the Task Administration business service. If you want to implement these actions for another inbox item, then you must create for the appropriate business object a custom method in a business service or a custom workflow process to perform the action, and then set up the action to invoke this custom method or workflow.</p> |

## About Deactivate Item Upon Finish and Deactivate Owners Upon Finish Fields

An Inbox item can be deactivated in the following ways:

- Deactivation can be done through one of the Universal Inbox Business Service methods.
- The Inbox type can be set up so that if the business method in the Actions record finishes without error, then the item is deactivated. For an example of an Inbox action setup, see [“Examples of Inbox Triggers” on page 174](#).

The item can be deactivated for all the owners or only for owner who takes the action, as follows:

- If Deactivate Item Upon Finish is set, then when one owner takes action on the item, the item is deactivated for all owners, and all owners see the item in their Completed Items List.
- If Deactivate Owners Upon Finish is set, then when one owner takes action, the item is deactivated (and moved to the Submitted Items List) for that owner alone. The item remains in the other owners' Inbox List.

### To set up an Inbox action

- 1 Navigate to the Administration - Inbox screen, then the All Inbox Types view.
- 2 In the Inbox Types list, select the Inbox Type, and navigate to the Actions view.

- 3 In the Actions list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                             | Comments                                                                                                                                                                                                               |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action                            | Select a value for the action. For more information, see <a href="#">Table 16 on page 147</a> .                                                                                                                        |
| Business Service                  | Select the business service to use, for example, Workflow Process Manager.                                                                                                                                             |
| Business Service Method           | Select the method to invoke for the selected business service.                                                                                                                                                         |
| Business Service Method Arguments | Type the arguments required to invoke the business service method. For example, if you use the Workflow Process Manager business service, then your workflow must contain the properties with the same argument names. |
| Deactivate Item Upon Finish       | Select the check box to deactivate the Inbox item for all owners, after the method has successfully completed.                                                                                                         |
| Deactivate Owners Upon Finish     | Select the check box to deactivate the Inbox item for one owner, after the method has successfully completed.                                                                                                          |

In addition to the arguments passed in the Business Service Method Arguments field, the arguments in the following table are always passed to your custom business service or workflow.

| Argument              | Comments                                                                                                                                                                                                              |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ActionLIC             | The value the user selected from the Action field. For example, if the Inbox Type has an Action Type of UINBOX_STATUS_TYPE, then the value of this argument is one of the following: Accepted, Received, or Rejected. |
| BusinessObjectName    | The value of the business object name field for the Inbox type.                                                                                                                                                       |
| Employee Login        | The login ID of the user who uses the Inbox type.                                                                                                                                                                     |
| InboxItemId           | The row ID of the Inbox item. This argument refers to the UInbox Item business component, which is used by the Submitted Items List view.                                                                             |
| InboxTypeId           | The row ID of the Inbox type.                                                                                                                                                                                         |
| InboxTypeName         | The name of the Inbox type.                                                                                                                                                                                           |
| IntegrationObjectName | The value of the integration about name for the Inbox type. If the Inbox type has an integration object name, then the value of this field is passed in this argument.                                                |

| Argument    | Comments                                                                                                                                                                              |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ObjectId    | The row ID of the business object name that is managed by the Inbox type.<br><br><b>NOTE:</b> This row ID is not the standard Object ID property that is available on every workflow. |
| OwnerInfold | The row ID of the Inbox Item Task. This argument refers to the UInbox Item Task business component, which is used by the Inbox Items List and Completed Items List view.              |

**NOTE:** The Inbox Action passes the row ID of the feature object in ObjectId. Within a workflow process, the ID of the primary business component on which the process is based must be stored in the process properties Object ID. Note the space character in the Object ID process property name. Therefore, the workflow process first copies the content of ObjectId to Object ID, if necessary.

## Configuring the Inbox for Use with Remote Databases

Inbox items can be downloaded to regional and local databases. The Inbox functionality downloads Inbox item records but does not download the underlying feature object.

**CAUTION:** The person who configures the Inbox must make sure that the feature object is downloaded. If the feature object is not downloaded, then remote users cannot view the underlying feature object in the Inbox item. For example, you must make sure that the service request records that the Inbox item points to are downloaded to the local database.

If your business processes require your users to download Inbox items to remote databases, then set up a Local Validation action. This action invokes a business service method that you define when a remote user attempts to view the underlying feature object.

The method that you define must return an argument to the Inbox, to tell the Inbox that the feature object is not present. The Inbox then displays an error message to the user and prevents the drilldown.

This task is a step in [“Process of Setting Up and Configuring Inbox” on page 143](#).

### To configure the Inbox for remote use

**1** Define a business service with a business service method that does the following:

**a** Accepts the following arguments from the Inbox:

- InboxItemId
- OwnerInfold
- ObjectId
- InboxTypeName

- ❑ BusinessObjectName
- ❑ IntegrationObjectName
- ❑ Name-value pairs from the Inbox Parameters tables

**b** Looks for the feature object, and, if the feature object is found, then sets the output argument LocalValidationError to N.

**2** Navigate to the Administration - Inbox screen, then the All Inbox Types view.

**3** In the Inbox Types list, select the type record.

**4** In the More Info form, set the Replication Level.

Values include:

- **All.** Set this value to download Inbox items to regional and local databases.
- **Regional.** Set this value to download Inbox items to regional databases only.

**5** Navigate to the Actions view.

In the Actions list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                             | Comments                                                                        |
|-----------------------------------|---------------------------------------------------------------------------------|
| Action                            | Select Local Validation.                                                        |
| Business Service                  | Select the business service that you defined in <a href="#">Step 1</a> .        |
| Business Service Method           | Select the business service method that you defined in <a href="#">Step 1</a> . |
| Business Service Method Arguments | Type the arguments for the business service method.                             |

## Setting Up Inbox Approval Translations

If your Siebel application is multilingual, then create a translation record for each language.

Use the Translations view to specify Inbox type names in other languages.

This task is a step in [“Process of Setting Up and Configuring Inbox”](#) on page 143.

### *To set up an Inbox translation*

**1** Navigate to the Administration - Inbox screen, then the All Inbox Types view.

**2** In the Inbox Types list, select the approval record, and navigate to the Translations view.

- 3 In the Translations list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field        | Comments                                                      |
|--------------|---------------------------------------------------------------|
| Display Name | Type the display name for translation of the Inbox type Name. |

## Configuring the Toggle Applets for Inbox Views

The Inbox supports dynamic toggle applets in three types of views. [Table 17](#) shows these views.

Table 17. Dynamic Toggle Applets for Inbox

| Views Supporting Dynamic Toggle Applet | Toggle Applet Name                  | Corresponding Business Component for Views |
|----------------------------------------|-------------------------------------|--------------------------------------------|
| Inbox items detail views               | UInbox Item Task Toggle List Applet | UInbox Item Task                           |
| Completed items detail views           |                                     |                                            |
| Submitted items detail views           | UInbox Item Toggle List Applet      | UInbox Item                                |

When you set up a dynamic toggle applet, you determine which type of form applet appears in the lower portion of the Inbox Detail views. Typically, the applet that is based on the business object of the underlying feature object is the most suitable applet.

For example, if you want to set up the Inbox for service request approvals, then you can create a dynamic toggle applet that displays the Service Request Detail Applet form applet when the business object for the Inbox type is Service Requests. Then you can create a link between the Inbox business components and the Service Request business component, so that the service request information can appear in the Inbox detail views.

### To configure dynamic toggle applets for the Inbox

- 1 In Siebel Tools, create an applet child object for the appropriate toggle applet, as follows:
  - a Create a form applet. Make sure that an Applet Web Template is defined for the Edit mode of this applet.
  - b Set the value of the Auto Toggle Field to Item Type BusObj Name.
  - c Set the value of the Auto Toggle Value field to the business object of the Inbox type. For example, set the value to Service Request.

For information about which toggle applet to create a child object for, see [Table 17](#). For more information about how to configure toggle applets, see *Configuring Siebel Business Applications*.



- 2 Create links between the business component of the feature object and the UInbox Item and UInbox Item Task business components by completing the following steps:

- a Create a link record.
- b Complete the fields in the following table.

| Field                     | Comments                                                                                                      |
|---------------------------|---------------------------------------------------------------------------------------------------------------|
| Name                      | Displays the link name after the Parent Business Component and Child Business Component fields are completed. |
| Parent Business Component | Select UInbox Item Task or UInbox Item.                                                                       |
| Child Business Component  | Select the business component for the dynamic toggle applet, for example, Service Request.                    |
| Source Field              | Type the Item Object ID.                                                                                      |
| Destination Field         | Type the ID of the feature object to appear in the dynamic toggle applet; usually this field is ID.           |

For more information about creating links, see *Configuring Siebel Business Applications*.

- 3 Associate the business component for the dynamic toggle applet with the two Inbox business objects UInbox ItemTask and UInbox Item History. For each link, perform the following steps:

- a Create a business object component record.
- b Complete the fields in the following table.

| Field | Comments                                                                                             |
|-------|------------------------------------------------------------------------------------------------------|
| Name  | Type the name of the business component for the dynamic toggle applet, for example, Service Request. |
| Link  | Type the name of the link from <a href="#">Step 2</a> .                                              |

## Configuring the Category Icon for the Inbox

You can change and add to the icons that appear in the Category field by editing the Inbox Category bitmap category. For more information about bitmap categories and working with images, see *Configuring Siebel Business Applications*.

### To add Category icon for a Category field value

- 1 Add the icon image file, in Graphic Interchange Format (GIF), to the `images` directory.

Base the size of your image on the existing Category icons in this directory, for example, `icon_approval.gif`.

- 2 In Siebel Tools, create a bitmap record for the Inbox Category bitmap category object, and complete the fields in the following table.

| Field  | Comments                                                                                                  |
|--------|-----------------------------------------------------------------------------------------------------------|
| Name   | Type the language-independent code for the value, from the UINBOX_INBOX_TYPE LOV, for example, CAMPAIGNS. |
| Bitmap | Type the name of the file from <a href="#">Step 1</a> .                                                   |

## Setting the Log File for Troubleshooting

For troubleshooting problems with the Inbox, set the Inbox log file to a verbose level. For information about log files, see *Siebel System Monitoring and Diagnostics Guide*.

### To set the level of the Inbox log file for troubleshooting

- In Siebel Tools, set the Log Level for the Inbox log file (alias of InboxLog) to 5.

## Universal Inbox Business Service Methods

This topic discusses the Universal Inbox business service and lists its methods.

The following definitions apply to the Universal Inbox Business Service:

- **Inbox item and Inbox item owner.** For most of this chapter, the term *Inbox item* has been used synonymously with Inbox item owner. But to understand how the methods for the Universal Inbox business service work, it is necessary to distinguish between the Inbox item and the inbox item owner. This distinction follows:
  - **The Inbox item.** The record that appears in the Submitted Items views.
  - **The Inbox item owner.** The record that appears in Inbox Items and Completed Items views. Owner information is contained in this record. Typically there are one or more Inbox item owner records associated with one Inbox item record.
- **Name-value pairs.** In addition to the predefined fields that belong to the Inbox item records (such as, type name, expiration date), there is provision to store additional data with the Inbox item in the form of name-value pairs. The name-value pairs are typically used to record data specific to the underlying feature object. The name-value pairs are stored in the Inbox Parameters table associated with the Inbox item.

Figure 2 shows the relationship between Inbox items and Inbox item owners.

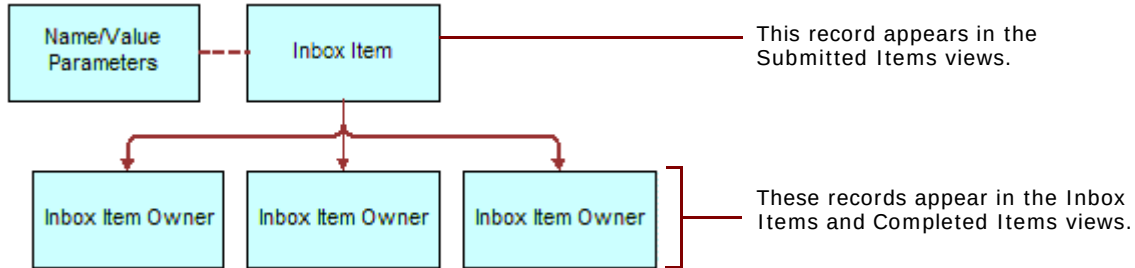


Figure 2. Relationship Between Inbox Items and Inbox Item Owners

Table 18 lists the methods for the Universal Inbox business service.

Table 18. Universal Inbox Business Service Methods

| Method Name          | Description                                                                                                                          |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| CreateInboxEx        | Creates an Inbox item and an Inbox item owner.                                                                                       |
| CreateInbox          | Creates multiple Inbox items and multiple Inbox item owners.                                                                         |
| CreateInboxItem      | Creates multiple Inbox items.                                                                                                        |
| CreateInboxOwner     | Creates multiple Inbox item owners for an Inbox item.                                                                                |
| IsInboxItemExisted   | Checks if an Inbox item exists.                                                                                                      |
| GetInboxItemInfo     | Returns field values from an Inbox item and, if GetParams is true, then returns the name-value pairs for the Inbox item.             |
| GetInboxParamInfo    | Returns the name-value pairs for an Inbox item.                                                                                      |
| GetInboxOwnerInfoEx  | Returns field values for an Inbox item owner.                                                                                        |
| GetInboxOwnerInfo    | Returns field values for multiple Inbox item owners for an Inbox item, and returns information about the action status of the items. |
| SetInboxParamInfo    | Inputs name-value pairs for an Inbox item.                                                                                           |
| UpdateInboxItemInfo  | Updates field values for an Inbox item.                                                                                              |
| DeactivateInboxItem  | Deactivates all Inbox item owners for an Inbox item and updates field values for that Inbox item.                                    |
| DeactivateInboxOwner | Deactivates an Inbox item owner, and updates the field values for that Inbox item owner.                                             |
| UpdateInboxOwnerInfo | Updates field values for an Inbox item owner.                                                                                        |
| DeleteInboxItem      | Deletes an Inbox item and all associated Inbox item owners.                                                                          |

Table 18. Universal Inbox Business Service Methods

| Method Name    | Description                                                                                                                                                                                                                                                                              |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initialize     | Creates an Inbox item and starts the business service method defined in the Initialize action. This method is intended for use only by those upgrading from the 7.5.3 version of the Siebel application.                                                                                 |
| RouteInboxItem | Deactivates existing Inbox item owners and creates new Inbox item owners for an Inbox item. This method is intended for use only by those upgrading from the 7.5.3 version of the Siebel application. For more information about this method, see <i>Siebel Database Upgrade Guide</i> . |

## CreateInboxEx Method

This method creates an Inbox item and an Inbox item owner. The name-value pairs are put into the Inbox Parameters table.

### Input Arguments

Table 19 lists the input arguments for this method.

Table 19. CreateInboxEx Method, Property Set, Type of InboxInfo

| Property Name           | Required | Comments                                                                                                                                                                                                                                                                                             |
|-------------------------|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| InboxName               | Yes      | This property is the name for the Inbox.                                                                                                                                                                                                                                                             |
| InboxTypeName           | Yes      | This property is the name of Inbox type.                                                                                                                                                                                                                                                             |
| InboxPartyId            | Yes      | This property is the party ID of the Inbox owner.                                                                                                                                                                                                                                                    |
| Comments                | No       | None.                                                                                                                                                                                                                                                                                                |
| ObjectId                | Yes      | This property is the object ID of the Inbox item.                                                                                                                                                                                                                                                    |
| InboxExpirationDuration | No       | The duration is expressed in seconds.                                                                                                                                                                                                                                                                |
| InboxUTCExpirationTS    | No       | This property is the UTC timestamp.                                                                                                                                                                                                                                                                  |
| ReplicationLevel        | No       | This property indicates whether this Inbox item must be routed when using remote databases. Select one of the following options: <ul style="list-style-type: none"> <li>■ All. Indicates HQ, Regional, Local.</li> <li>■ Regional. Indicates HQ, Regional.</li> <li>■ None. Indicates HQ.</li> </ul> |
| OwnerPartyId            | Yes      | This property is the party ID of the Inbox owner.                                                                                                                                                                                                                                                    |
| OwnerPriority           | No       | None.                                                                                                                                                                                                                                                                                                |
| OwnerQueueDuration      | No       | The duration is expressed in seconds.                                                                                                                                                                                                                                                                |

Table 19. CreateInboxEx Method, Property Set, Type of InboxInfo

| Property Name          | Required | Comments                                        |
|------------------------|----------|-------------------------------------------------|
| OwnerUTCStartWorkingTS | No       | This property is the UTC timestamp.             |
| OwnerActionLIC         | No       | This property is the language-independent code. |
| OwnerUTCDueTS          | No       | This property is the UTC timestamp.             |

**Output Arguments**

[Table 20](#) lists the output arguments for this method.

Table 20. CreateInboxEx Method, Property Set

| Property Name | Comments                                                     |
|---------------|--------------------------------------------------------------|
| InboxItemId   | This property is the row ID of the newly-created Inbox item. |
| OwnerInfoId   | This property is the information ID for the Inbox owner.     |

## CreateInbox Method

This method creates multiple Inbox items and multiple Inbox item owners. The name-value pairs are put into the Inbox Parameters table.

**Input Arguments**

[Table 21](#) lists the input arguments for this method for the property set.

Table 21. CreateInbox Method, Property Set, Type of InboxInfo

| Property Name    | Required | Comments                                                      |
|------------------|----------|---------------------------------------------------------------|
| Child properties | No       | Multiple children are allowed. See <a href="#">Table 22</a> . |

[Table 22](#) lists the input arguments for this method for the child property set.

Table 22. CreateInbox Method, Child Property Set, Type of InboxItemInfo

| Property Name           | Required | Comments                                          |
|-------------------------|----------|---------------------------------------------------|
| InboxName               | Yes      | This property is the name for the Inbox.          |
| InboxTypeName           | Yes      | This property is the name of Inbox type.          |
| InboxPartyId            | Yes      | This property is the party ID of the Inbox owner. |
| ObjectId                | No       | This property is the object ID of the inbox item. |
| InboxExpirationDuration | No       | The duration is expressed in seconds.             |

Table 22. CreateInbox Method, Child Property Set, Type of InboxItemInfo

| Property Name        | Required | Comments                                                      |
|----------------------|----------|---------------------------------------------------------------|
| InboxUTCExpirationTS | No       | This property is the UTC timestamp.                           |
| Comments             | No       | None.                                                         |
| Child properties     | No       | Multiple children are allowed. See <a href="#">Table 23</a> . |

[Table 23](#) lists the input arguments for this method for the grandchild property set.

Table 23. CreateInbox Method, Grandchild Property Set, Type of InboxOwnerInfo

| Property Name          | Required | Comments                                          |
|------------------------|----------|---------------------------------------------------|
| OwnerPartyId           | Yes      | This property is the party ID of the Inbox owner. |
| OwnerPriority          | No       | None.                                             |
| OwnerQueueDuration     | No       | The duration is expressed in seconds.             |
| OwnerUTCDueTS          | No       | This property is the UTC timestamp.               |
| OwnerUTCStartWorkingTS | No       | This property is the UTC timestamp.               |
| OwnerActionLIC         | No       | This property is the language-independent code.   |

### Output Arguments

[Table 24](#) lists the output arguments for this method for the property set.

Table 24. CreateInbox Method, Property Set

| Property Name    | Comments                                                          |
|------------------|-------------------------------------------------------------------|
| Child properties | Multiple children can be returned. See <a href="#">Table 25</a> . |

[Table 25](#) lists the output arguments for this method for the child property set.

Table 25. CreateInbox Method, Child Property Set, Type of ItemOutput

| Property Name    | Comments                                                          |
|------------------|-------------------------------------------------------------------|
| InboxItemId      | This property is the row ID of the newly-created Inbox item.      |
| Child properties | Multiple children can be returned. See <a href="#">Table 26</a> . |

Table 26 lists the output arguments for this method for the grandchild property set.

Table 26. CreateInbox Method, Grandchild Property Set, Type of OwnerInfoOutput

| Property Name | Comments                                                |
|---------------|---------------------------------------------------------|
| OwnerPartyId  | This property is the party ID of the Inbox owner.       |
| OwnerInfoId   | This property is the information ID of the Inbox owner. |

## CreateInboxItem Method

This method creates multiple Inbox items. The name-value pairs are put into the Inbox Parameters table.

### Input Arguments

Table 27 lists the input arguments for this method.

Table 27. CreateInboxItem Method, Property Set, Type of InboxItemInfo

| Property Name           | Required | Comments                                                                                                                                                                                                                                                                                                    |
|-------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| InboxName               | Yes      | This property is the name for the Inbox.                                                                                                                                                                                                                                                                    |
| InboxTypeName           | Yes      | This property is the name of Inbox type.                                                                                                                                                                                                                                                                    |
| InboxPartyId            | Yes      | This property is the party ID of the Inbox owner.                                                                                                                                                                                                                                                           |
| ObjectId                | Yes      | This property is the object ID of the inbox item.                                                                                                                                                                                                                                                           |
| InboxExpirationDuration | No       | The duration is expressed in seconds.                                                                                                                                                                                                                                                                       |
| InboxUTCExpirationTS    | No       | This property is the UTC timestamp.                                                                                                                                                                                                                                                                         |
| Comments                | No       | None.                                                                                                                                                                                                                                                                                                       |
| ReplicationLevel        | No       | <p>This property indicates whether this Inbox item must be routed when using remote databases. Select one of the following options:</p> <ul style="list-style-type: none"> <li>■ All. Indicates HQ, Regional, Local.</li> <li>■ Regional. Indicates HQ, Regional.</li> <li>■ None. Indicates HQ.</li> </ul> |

### Output Arguments

Table 28 lists the output arguments for this method.

Table 28. CreateInboxItem Method, Property Set, Type of ItemOutput

| Property Name | Comments                                                     |
|---------------|--------------------------------------------------------------|
| InboxItemId   | This property is the row ID of the newly-created Inbox item. |

## CreateInboxOwner Method

This method creates multiple Inbox item owners for an Inbox item. If DeactivateOthers is true, then the method deactivates the current active Inbox item owners before creating new owners.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Input Arguments

Table 29 lists the input arguments for this method for the property set.

Table 29. CreateInboxOwner Method, Property Set

| Property Name    | Required | Comments                                                                                                                       |
|------------------|----------|--------------------------------------------------------------------------------------------------------------------------------|
| InboxItemId      | No       | This property is the row ID of the newly-created Inbox item.                                                                   |
| ObjectId         | No       | This property is the object ID of the inbox item.                                                                              |
| InboxTypeName    | No       | This property is the name of Inbox type.                                                                                       |
| DeactivateOthers | No       | This property deactivates the current active Inbox item owners before creating new owners when the value is Yes (the default). |
| Child properties | No       | Multiple children are allowed. See Table 30.                                                                                   |

Table 30 lists the input arguments for this method for the child property set.

Table 30. CreateInboxOwner Method, Child Property Set, Type of InboxOwnerInfo

| Property Name      | Required | Comments                                          |
|--------------------|----------|---------------------------------------------------|
| OwnerPartyId       | Yes      | This property is the party ID of the Inbox owner. |
| OwnerPriority      | No       | None.                                             |
| OwnerQueueDuration | No       | The duration is expressed in seconds.             |
| OwnerUTCDueTS      | No       | This property is the UTC timestamp.               |



Table 30. CreateInboxOwner Method, Child Property Set, Type of InboxOwnerInfo

| Property Name          | Required | Comments                                        |
|------------------------|----------|-------------------------------------------------|
| OwnerUTCStartWorkingTS | No       | This property is the UTC timestamp.             |
| OwnerActionLIC         | No       | This property is the language-independent code. |

### Output Arguments

Table 31 lists the output arguments for this method for the property set.

Table 31. CreateInboxOwner Method, Property Set, Type of ItemOutput

| Property Name                         | Comments                                                                       |
|---------------------------------------|--------------------------------------------------------------------------------|
| InboxItemId                           | This property is the row ID of the newly-created Inbox item.                   |
| DeactivateOthers                      | This property indicates whether or not the other owners have been deactivated. |
| Child properties<br>(OwnerInfoOutput) | Multiple children can be returned. See Table 32.                               |

Table 32 lists the output arguments for this method for the child property set.

Table 32. CreateInboxOwner Method, Child Property Set, Type of OwnerInfoOutput

| Property Name | Comments                                                |
|---------------|---------------------------------------------------------|
| OwnerPartyId  | This property is the party ID of the Inbox owner.       |
| OwnerInfoId   | This property is the information ID of the Inbox owner. |

## IsInboxItemExisted Method

This method checks if an Inbox item exists.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Input Arguments

Table 33 lists the input arguments for this method.

Table 33. IsInboxItemExisted Method, Property Set

| Property Name | Required | Comments                                          |
|---------------|----------|---------------------------------------------------|
| InboxItemId   | No       | This property is the row ID of the Inbox item.    |
| ObjectId      | No       | This property is the object ID of the Inbox item. |
| InboxTypeName | No       | This property is the name of Inbox type.          |

### Output Arguments

Table 34 lists the output arguments for this method.

Table 34. IsInboxItemExisted Method, Property Set

| Property Name      | Comments                                                                                          |
|--------------------|---------------------------------------------------------------------------------------------------|
| IsInboxItemExisted | A 1 indicates the Inbox item exists, and a 0 indicates it does not exist.                         |
| InboxItemId        | This property is the row ID of the Inbox item.                                                    |
| HasActiveOwners    | A 1 indicates the Inbox item has active owners, and a 0 indicates it does not have active owners. |

## GetInboxItemInfo Method

This method returns field values from an Inbox item and, if GetParams is true, then returns the name-value pairs for the Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Input Arguments

Table 35 lists the input arguments for this method.

Table 35. GetInboxItemInfo Method, Property Set

| Property Name | Required | Comments                                                                                         |
|---------------|----------|--------------------------------------------------------------------------------------------------|
| InboxItemId   | No       | This property is the row ID of the Inbox item. The ID is not updated, but is used for searching. |
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.  |
| InboxTypeName | No       | This property is the name of Inbox type. It is not updated, but is used for searching.           |
| GetParams     | No       | This property returns all name-value pairs if the value is Y.                                    |

### Output Arguments

Table 36 lists the output arguments for this method.

Table 36. GetInboxItemInfo Method, Property Set

| Property Name        | Comments                                          |
|----------------------|---------------------------------------------------|
| ObjectId             | This property is the object ID of the Inbox item. |
| InboxTypeId          | This property is the ID for the Inbox type.       |
| InboxTypeName        | This property is the name of Inbox type.          |
| InboxName            | This property is the name for the Inbox.          |
| InboxPartyId         | This property is the party ID of the Inbox owner. |
| Comments             | None.                                             |
| InboxUTCExpirationTS | This property is the UTC timestamp.               |
| Name - value pairs   | None.                                             |

## GetInboxParamInfo Method

This method returns the name-value pairs for an Inbox item.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Input Arguments

Table 37 lists the input arguments for this method.

Table 37. GetInboxParamInfo Method, Property Set

| Property Name | Required | Comments                                                                                         |
|---------------|----------|--------------------------------------------------------------------------------------------------|
| InboxItemId   | No       | This property is the row ID of the Inbox item. The ID is not updated, but is used for searching. |
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.  |
| InboxTypeName | No       | This property is the name of Inbox type. It is not updated, but is used for searching.           |

### Output Arguments

Table 38 lists the output arguments for this method.

Table 38. GetInboxParamInfo Method, Property Set

| Property Name      | Comments |
|--------------------|----------|
| Name - value pairs | None.    |

## GetInboxOwnerInfoEx Method

This method returns field values for an Inbox item owner. If the Inbox item owner is in the screen-active business component record, then the method returns the values from the screen-active business component.

The method searches as follows:

- 1 OwnerInfolId
- 2 InboxItemId, OwnerPartyId
- 3 ObjectId, InboxTypeName, OwnerPartyId

### Input Arguments

Table 39 lists the input arguments for this method.

Table 39. GetInboxOwnerInfoEx Method, Property Set

| Property Name | Required | Comments                                                                                           |
|---------------|----------|----------------------------------------------------------------------------------------------------|
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.    |
| InboxTypeName | No       | This property is the name of Inbox type. It is not updated, but is used for searching.             |
| OwnerPartyId  | No       | This property is the party ID for the Inbox owner. It is not updated, but is used for searching.   |
| InboxItemId   | No       | This property is the row ID of the Inbox item. It is not updated, but is used for searching.       |
| OwnerInfoId   | No       | This property is the information ID for Inbox owner. It is not updated, but is used for searching. |

### Output Arguments

Table 40 lists the output arguments for this method.

Table 40. GetInboxOwnerInfoEx Method, Property Set

| Property Name         | Comments                                                               |
|-----------------------|------------------------------------------------------------------------|
| OwnerInfoId           | This property is the information ID for Inbox owner.                   |
| OwnerPriority         | This property is the owner priority for the Inbox item task.           |
| OwnerActionLIC        | This property is the language-independent code.                        |
| OwnerUTCDueTS         | This property is the UTC timestamp.                                    |
| OwnerComments         | None.                                                                  |
| OwnerStartWorkingTime | This property is the owner start working time for the Inbox item task. |
| OwnerEndWorkingTime   | This property is the owner end working time for the Inbox item task.   |

## GetInboxOwnerInfo Method

This method returns field values for multiple Inbox item owners for an Inbox item, and returns information about the action status of the items.

The method searches as follows:

- 1 InboxItemId

## 2 ObjectId + InboxTypeName

### Input Arguments

Table 41 lists the input arguments for this method.

Table 41. GetInboxOwnerInfo Method, Property Set

| Property Name   | Required | Comments                                                                                                             |
|-----------------|----------|----------------------------------------------------------------------------------------------------------------------|
| InboxItemId     | No       | This property is the row ID of the Inbox item. It is not updated, but is used for searching.                         |
| ObjectId        | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.                      |
| InboxTypeName   | No       | This property is the name of Inbox type. It is not updated, but is used for searching.                               |
| ActiveOwnerOnly | No       | This property indicates that information is returned only for active owners. The default is TRUE.                    |
| EvaluateOR      | No       | This property evaluates the OR condition on all owners' actions using the Action that is passed in from the caller.  |
| EvaluateAND     | No       | This property evaluates the AND condition on all owners' actions using the Action that is passed in from the caller. |

### Output Arguments

Table 42 lists the output arguments for this method for the property set.

Table 42. GetInboxOwnerInfo Method, Property Set

| Property Name    | Comments                                                                                                                           |
|------------------|------------------------------------------------------------------------------------------------------------------------------------|
| OREvalResult     | This property is 1 if one or more owner's inbox tasks have OwnerAction equal to the input parameter EvaluateOr. Otherwise it is 0. |
| ANDEvalResult    | This property is 1 if all the owner's inbox tasks have OwnerAction equal to the input parameter EvaluateAnd. Otherwise it is 0.    |
| Child Properties | Multiple children can be returned. See Table 43.                                                                                   |

Table 43 lists the output arguments for this method for the child property set.

Table 43. GetInboxOwnerInfo Method, Child Property Set, Type of InboxOwnerInfo

| Property Name         | Comments                                                 |
|-----------------------|----------------------------------------------------------|
| OwnerInfoId           | This property is the information ID for the Inbox owner. |
| OwnerPriority         | None.                                                    |
| OwnerActionLIC        | This property is the language-independent code.          |
| OwnerUTCDueTS         | This property is the UTC timestamp.                      |
| OwnerComments         | None.                                                    |
| OwnerStartWorkingTime | This property is the UTC timestamp.                      |
| OwnerEndWorkingTime   | This property is the UTC timestamp.                      |

## SetInboxParamInfo Method

This method inputs name-value pairs for an Inbox item. The name-value pairs are put into the Inbox Parameters table.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Input Arguments

Table 44 lists the input arguments for this method.

Table 44. SetInboxParamInfo Method, Property Set

| Property Name | Required | Comments                                                                                        |
|---------------|----------|-------------------------------------------------------------------------------------------------|
| InboxItemId   | No       | This property is the row ID of the Inbox item. It is not updated, but is used for searching.    |
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching. |
| InboxTypeName | No       | This property is the name of Inbox type. It is not updated, but is used for searching.          |

## UpdateInboxItemInfo Method

This method updates field values for an Inbox item. The name-value pairs are put into the Inbox Parameters table.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Input Arguments

Table 45 lists the input arguments for this method.

Table 45. UpdateInboxItemInfo Method, Property Set

| Property Name           | Required | Comments                                                                                                                                                                                                                                                                                                 |
|-------------------------|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| InboxItemId             | No       | This property is the row ID of the Inbox item. It is not updated, but is used for searching.                                                                                                                                                                                                             |
| ObjectId                | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.                                                                                                                                                                                                          |
| InboxTypeName           | No       | This property is the name of Inbox type. It is not updated, but is used for searching.                                                                                                                                                                                                                   |
| InboxName               | No       | This property is the name of the Inbox. The value passed cannot be empty.                                                                                                                                                                                                                                |
| InboxPartyId            | No       | This property is the party ID of the Inbox owner. The value passed cannot be empty.                                                                                                                                                                                                                      |
| ReplicationLevel        | No       | This property indicates whether this Inbox item must be routed when using remote mobile client. Select one of the following options: <ul style="list-style-type: none"> <li>■ All. Indicates HQ, Regional, Local.</li> <li>■ Regional. Indicates HQ, Regional.</li> <li>■ None. Indicates HQ.</li> </ul> |
| Comments                | No       | None.                                                                                                                                                                                                                                                                                                    |
| InboxExpirationDuration | No       | The duration is expressed in seconds. The value passed cannot be empty.                                                                                                                                                                                                                                  |
| InboxUTCExpirationTS    | No       | This property is the UTC timestamp. The value passed cannot be empty.                                                                                                                                                                                                                                    |

## DeactivateInboxItem Method

This method deactivates all Inbox item owners for an Inbox item and updates field values for that Inbox item. The name-value pairs are put into the Inbox Parameters table.

The method searches as follows:

- 1 InboxItemId



## 2 ObjectId + InboxTypeName

### Input Arguments

Table 46 lists the input arguments for this method for the property set.

Table 46. DeactivateInboxItem Method, Property Set

| Property Name           | Required | Comments                                                                                                                                                                                                                                                                                                             |
|-------------------------|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| InboxItemId             | No       | This property is the row ID of the Inbox item. It is not updated, but is used for searching.                                                                                                                                                                                                                         |
| ObjectId                | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.                                                                                                                                                                                                                      |
| InboxTypeName           | No       | This property is the name of Inbox type. It is not updated, but is used for searching.                                                                                                                                                                                                                               |
| InboxName               | No       | This property is the name of the Inbox. The value passed cannot be empty.                                                                                                                                                                                                                                            |
| InboxPartyId            | No       | This property is the party ID of the Inbox owner. The value passed cannot be empty.                                                                                                                                                                                                                                  |
| ReplicationLevel        | No       | <p>This property indicates whether this Inbox item must be routed when using remote mobile client. Select from one of the following options:</p> <ul style="list-style-type: none"> <li>■ All. Indicates HQ, Regional, Local.</li> <li>■ Regional. Indicates HQ, Regional.</li> <li>■ None. Indicates HQ.</li> </ul> |
| Comments                | No       | None.                                                                                                                                                                                                                                                                                                                |
| InboxExpirationDuration | No       | The duration is expressed in seconds. The value passed cannot be empty.                                                                                                                                                                                                                                              |
| InboxUTCExpirationTS    | No       | This property is the UTC timestamp. The value passed cannot be empty.                                                                                                                                                                                                                                                |
| Child Properties        | No       | Multiple children are allowed. See Table 47.                                                                                                                                                                                                                                                                         |

Table 47 lists the input arguments for this method for the child property set.

Table 47. DeactivateInboxItem Method, Child Property Set, Type of InboxOwnerInfo

| Property Name         | Required | Comments                                                                                               |
|-----------------------|----------|--------------------------------------------------------------------------------------------------------|
| OwnerPartyId          | No       | This property is the party ID for the Inbox owner. It is not updated, but is used for searching.       |
| OwnerInfoId           | No       | This property is the information ID for the Inbox owner. It is not updated, but is used for searching. |
| OwnerPriority         | No       | None.                                                                                                  |
| OwnerActionLIC        | No       | This property is the language-independent code.                                                        |
| OwnerComments         | No       | None.                                                                                                  |
| OwnerStartWorkingTime | No       | This property is the UTC timestamp. To set to the current time, enter a value of Y, T, or TRUE.        |
| OwnerEndWorkingTime   | No       | This property is the UTC timestamp. To set to the current time, enter a value of Y, T, or TRUE.        |

## DeactivateInboxOwner Method

This method deactivates an Inbox item owner and updates field values for that Inbox item owner.

The method searches as follows:

- 1 OwnerInfoId
- 2 InboxItemId, OwnerPartyId
- 3 ObjectId, InboxTypeName, OwnerPartyId

If there is SSASqlErrWriteConflict conflict, then clear the error message to show the error message on UI.

### Input Arguments

Table 48 lists the input arguments for this method.

Table 48. DeactivateInboxOwner Method, Property Set

| Property Name | Required | Comments                                                                                        |
|---------------|----------|-------------------------------------------------------------------------------------------------|
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching. |
| InboxTypeName | No       | This property is the name of Inbox type. It is not updated, but is used for searching.          |

Table 48. DeactivateInboxOwner Method, Property Set

| Property Name         | Required | Comments                                                                                                   |
|-----------------------|----------|------------------------------------------------------------------------------------------------------------|
| OwnerPartyId          | No       | This property is the party ID for the Inbox owner. The ID is not updated, but is used for searching.       |
| InboxItemId           | No       | This property is the row ID of the Inbox item. The ID is not updated, but is used for searching.           |
| OwnerInfoId           | No       | This property is the information ID for the Inbox owner. The ID is not updated, but is used for searching. |
| OwnerPriority         | No       | None.                                                                                                      |
| OwnerActionLIC        | No       | This property is the language-independent code.                                                            |
| OwnerComments         | No       | None.                                                                                                      |
| OwnerStartWorkingTime | No       | This property is the UTC timestamp. To set to the current time, enter a value of Y, T, or TRUE.            |
| OwnerEndWorkingTime   | No       | This property is the UTC timestamp. To set to the current time, enter a value of Y, T, or TRUE.            |

## UpdateInboxOwnerInfo Method

This method updates field values for an Inbox item owner.

The method searches as follows:

- 1 OwnerInfoId
- 2 InboxItemId, OwnerPartyId
- 3 ObjectId, InboxTypeName, OwnerPartyId

### Input Arguments

Table 49 lists the input arguments for this method.

Table 49. UpdateInboxOwnerInfo Method, Property Set

| Property Name | Required | Comments                                                                                         |
|---------------|----------|--------------------------------------------------------------------------------------------------|
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching.  |
| InboxTypeName | No       | This property is the name for the type of Inbox. It is not updated, but is used for searching.   |
| OwnerPartyId  | No       | This property is the party ID for the Inbox owner. It is not updated, but is used for searching. |

Table 49. UpdateInboxOwnerInfo Method, Property Set

| Property Name         | Required | Comments                                                                                               |
|-----------------------|----------|--------------------------------------------------------------------------------------------------------|
| InboxItemId           | No       | This property is the row ID of the Inbox item. The ID is not updated, but is used for searching.       |
| OwnerInfoId           | No       | This property is the information ID for the Inbox owner. It is not updated, but is used for searching. |
| OwnerPriority         | No       | None.                                                                                                  |
| OwnerActionLIC        | No       | This property is the language-independent code.                                                        |
| OwnerQueueDuration    | No       | The duration is expressed in seconds.                                                                  |
| OwnerUTCDueTS         | No       | This property is the UTC timestamp.                                                                    |
| OwnerComments         | No       | None.                                                                                                  |
| OwnerStartWorkingTime | No       | This property is the UTC timestamp. To set to the current time, enter a value of Y, T, or TRUE.        |
| OwnerEndWorkingTime   | No       | This property is the UTC timestamp. To set to the current time, enter a value of Y, T, or TRUE.        |

## DeleteInboxItem Method

This method deletes an Inbox item and all associated Inbox item owners.

The method searches as follows:

- 1 InboxItemId
- 2 ObjectId + InboxTypeName

### Usage Example

Call this method when the underlying feature object for the Inbox item has been deleted.

### Input Arguments

Table 50 lists the input arguments for this method.

Table 50. DeleteInboxItem Method, Property Set

| Property Name | Required | Comments                                                                                     |
|---------------|----------|----------------------------------------------------------------------------------------------|
| InboxItemId   | No       | This property is the row ID of the Inbox item. It is not updated, but is used for searching. |

Table 50. DeleteInboxItem Method, Property Set

| Property Name | Required | Comments                                                                                        |
|---------------|----------|-------------------------------------------------------------------------------------------------|
| ObjectId      | No       | This property is the object ID of the Inbox item. It is not updated, but is used for searching. |
| InboxTypeName | No       | This property is the name of Inbox type. It is not updated, but is used for searching.          |

## Initialize Method

This method creates an Inbox item and starts the business service method defined in the Initialize action. This method is intended for use only by those upgrading from the 7.5.3 version of the Siebel application.

### Input Arguments

[Table 51](#) lists the input arguments for this method.

Table 51. Initialize Method, Property Set

| Property Name     | Required | Comments                                                |
|-------------------|----------|---------------------------------------------------------|
| ItemType          | Yes      | None.                                                   |
| ItemDescription   | Yes      | None.                                                   |
| ItemObjectId      | Yes      | None.                                                   |
| ItemSubmittedBy   | Yes      | None.                                                   |
| ItemPriority      | No       | Not supported in version 7.7 of the Siebel application. |
| ItemQueueDuration | No       | None.                                                   |
| ItemComments      | No       | None.                                                   |

## RouteInboxItem Method

This method deactivates existing Inbox item owners and creates new Inbox item owners for an Inbox item. This method is intended for use only by those upgrading from the 7.5.3 version of the Siebel application. For more information about this method, see *Siebel Database Upgrade Guide*.

## Input Arguments

[Table 52](#) lists the input arguments for this method for the property set.

Table 52. RouteInboxItem Method, Property Set

| Property Name          | Required | Comments                                                      |
|------------------------|----------|---------------------------------------------------------------|
| ItemWorkflowInstanceId | Yes      | None.                                                         |
| Child Properties       | Yes      | Multiple children are allowed. See <a href="#">Table 53</a> . |

[Table 53](#) lists the input arguments for this method for the child property set.

Table 53. RouteInboxItem Method, Child Property Set, Type of TaskOwnerInfo

| Property Name | Required | Comments                                    |
|---------------|----------|---------------------------------------------|
| TaskOwnerId   | Yes      | This property is the ID for the task owner. |
| TaskStatus    | No       | This property is the status for the task.   |
| TaskPriority  | No       | This property is the priority for the task. |

## Output Arguments

[Table 54](#) lists the output arguments for this method for property set.

Table 54. RouteInboxItem Method, Property Set, Type of ItemOutput

| Property Name    | Comments                                                          |
|------------------|-------------------------------------------------------------------|
| InboxItemId      | This property is the row ID of the newly-created Inbox item.      |
| Child properties | Multiple children can be returned. See <a href="#">Table 55</a> . |

[Table 55](#) lists the output arguments for this method for the child property set.

Table 55. RouteInboxItem Method, Child Property Set, Type of OwnerInfoOutput

| Property Name | Comments                                                |
|---------------|---------------------------------------------------------|
| OwnerPartyId  | This property is the party ID of the Inbox owner.       |
| OwnerInfoId   | This property is the information ID of the Inbox owner. |

# Examples of Inbox Triggers

This topic includes the following samples of Inbox triggers:

- ["Inbox - Service Demo Creation Workflow" on page 176](#)

- [“Inbox - Service Action Workflow” on page 177](#)
- [“Inbox - Service Detail Action Workflow” on page 178](#)
- [“Inbox Trigger Used in ESS” on page 179](#)
- [“Inbox Trigger Using Server Script” on page 181](#)

## About the Sample Workflows

The following pages describe three sample workflows that apply to service requests and that illustrate the use of the Inbox. You can use Siebel Tools to import the workflow files into the Siebel Sample Database, and try out the workflows. Additionally, you can import them into your own implementation and modify them for your business needs.

## Where to Find the Sample Workflow Files

These sample workflows are provided as part of the sample database installation. You can find these workflow files in the `SIEBEL_CLIENT_HOME\SAMPLE\WORKFLOWS` directory. (For example, `C:\Program Files\Siebel\7.8\web client\SAMPLE\WORKFLOWS`)

The names of the files that contain the sample workflows are:

- `Inbox - Service Demo Creation.xml`
- `Inbox - Service Action.xml`
- `Inbox - Service Detail Action.xml`

## Creating Inbox Types for Use with the Sample Workflows

If you want to try out the sample workflows in the Sample Database, then you must create the SRManager and SROwner Inbox types.

### *To create two Inbox types for use with the sample workflows*

- 1 Create two Inbox types that use the field values in the following table.

| Field Name                      | Value for First Inbox Type | Value for Second Inbox Type |
|---------------------------------|----------------------------|-----------------------------|
| Name                            | SROwner                    | SRManager                   |
| Business Object Name            | Service Request            | Service Request             |
| Category                        | APPROVALS                  | APPROVALS                   |
| Default Queue Duration (Days)   | 0                          | 0                           |
| Item Expiration Duration (Days) | 0                          | 0                           |
| Action Type                     | SR_STATUS                  | None                        |

For more information, see [“Creating Inbox Types” on page 145](#).

- 2 Set up a link to the Service Request Detail View for the SROwner and the SRManager Inbox types. For more information, see [“Setting Up Inbox Links to Views and SmartScripts” on page 146](#).
- 3 Create an Inbox Actions record for the SROwner Inbox type that uses the field values in the following table.

| Field Name                        | Value                                   |
|-----------------------------------|-----------------------------------------|
| Action                            | Action Field Dropdown                   |
| Business Service                  | Workflow Process Manager                |
| Business Service Method           | RunProcess                              |
| Business Service Method Arguments | "ProcessName", "Inbox - Service Action" |

For more information, see [“Setting Up Inbox Actions” on page 147](#).

## Inbox - Service Demo Creation Workflow

This workflow assigns service requests and creates inbox items. The workflow acts only on service requests where Area is Network; service requests in all other areas are ignored.

If the service request does not have an owner, then it is assigned to APARKER. Inbox items and Inbox item owners are created for the service request's owner and the service request owner's manager. Both users are then sent email to notify them that there are new items in their Inboxes.

The workflow is triggered when a service request is created. [Figure 3](#) shows the diagram for this workflow.

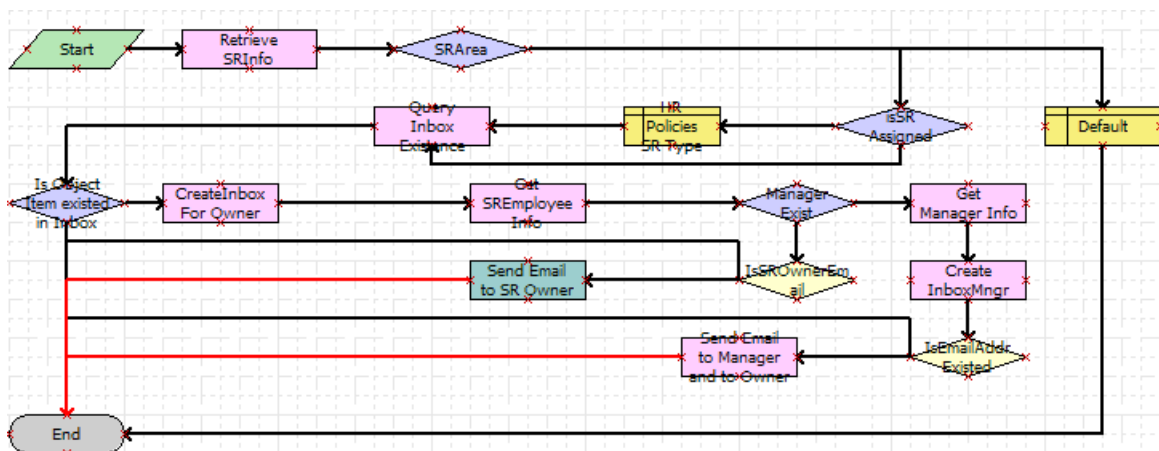


Figure 3. Inbox - Service Demo Creation Workflow

**Workflow Description.** This workflow performs the following actions:



- 1 **Retrieve SRInfo.** This step retrieves data about the service request, for example, its area, status, and service request number.
- 2 **SRArea, isSR Assigned, HR Policies SR Type, and Default.** If the service request is unassigned and value of the Area field is Network, then these steps assign the service request to APARKER.
- 3 **Query Inbox Existence and Is Object Item existed in Inbox.** These steps check if an Inbox item for this service request already exists.
- 4 **CreateInbox For Owner.** If an Inbox item does not already exist, then this step calls the CreateInboxEx method which creates an Inbox item of Inbox type SROwner, and an Inbox item owner. For more information, see ["CreateInboxEx Method" on page 156](#).
- 5 **Get SREmployee Info.** This step retrieves the email address of the service request's owner.
- 6 **Manager Exist.** This step determines if the owner of the service request has a manager.
- 7 **Get Manager Info, Create InboxMgr, IsEmailAddrExisted, and Send Email to Manager and to Owner.** If the owner of the service request has a manager, then:
  - These steps retrieve information about the manager.
  - These steps call the CreateInboxEx method to create an Inbox item of Inbox type SRManager, and an Inbox item owner.
  - These steps send email to both the manager and the owner of the service request.
- 8 **IsSROwnerEmail and Send Email to SR Owner.** If the owner does not have a manager, then these steps send email to the owner of the service request.

## Inbox - Service Action Workflow

This workflow synchronizes the status for service requests and inbox items.

This workflow makes sure that changes to the service request records, where the value of the Area field is Network, and the Inbox item that is based on those service requests are synchronized:

- When a user takes action on a service request Inbox item, the status of the service request record is updated accordingly. For example, when the Inbox item is closed by its owner, the workflow changes the status of the underlying service request to closed.
- When a user changes the Status of a service request, the actions available for the corresponding Inbox item are appropriately updated. In this case, the Inbox items for both the owner and the manager are deactivated and removed from the Inbox.

The workflow starts when:

- The user takes action on a service request Inbox item.
- The run-time event attached to the WriteRecordUpdate event on the Service Request business component is triggered.

Figure 4 shows the diagram for this workflow.

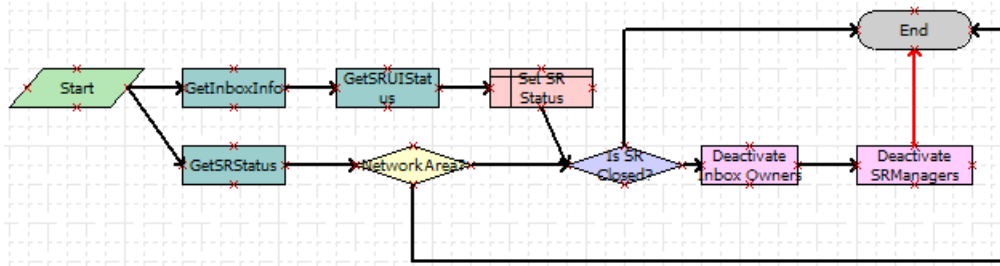


Figure 4. Inbox - Service Action Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **GetInboxInfo.** This step retrieves a set of parameters about the Inbox item. One of the parameters is `ObjectId`, which is the `ServiceRequestId`. This step positions the Service Request business component on the `ObjectId` that has been passed in.
- 2 **GetSRUIStatus.** This step retrieves the action taken by the user on the service request Inbox item.
- 3 **Set SR Status.** This step updates the Status of the service request according to the action taken by the user on the Inbox item.
- 4 **GetSRStatus.** This step retrieves the status and area information about the service request.
- 5 **Network Area?** This step determines if the value of the Area field is Network. If not, then the workflow ends.
- 6 **Is SR Closed?, Deactivate Inbox Owners and Deactivate SRManagers.** If the service request is closed, then these steps call the `DeactivateInboxItem` method to deactivate Inbox item owners for the owner of the service request and their manager. For more information, see ["DeactivateInboxItem Method" on page 168](#).

## Inbox - Service Detail Action Workflow

This workflow updates inbox items for status changes made in the Detail view of the Inbox.

This workflow is triggered when a user changes the status of a service request from within the Inbox screen, Inbox Items List, and then the Detail view. This workflow updates the Inbox item of the service request according to the change made to the service request.

This workflow starts when the run-time event attached to the WriteRecordUpdate event on the Service Request business component of the UInbox Item Task business object is triggered. [Figure 5](#) shows the diagram for this workflow.

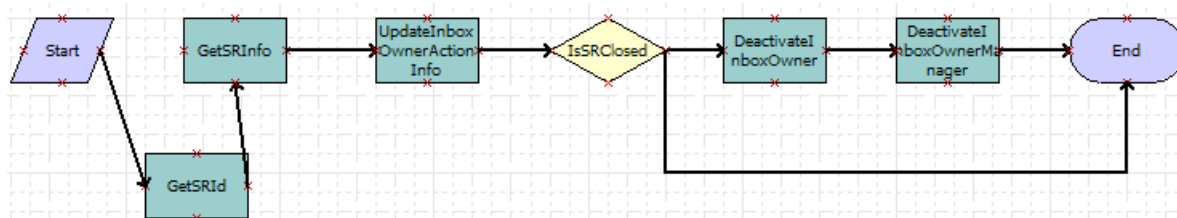


Figure 5. Inbox - Service Detail Action Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **GetSRId.** This step gets the service request row ID and the Inbox item ID.
- 2 **GetSRInfo.** This step gets the updated information from the service request record.
- 3 **UpdateInboxOwnerActionInfo.** This step calls the UpdateInboxOwnerInfo method to update the Inbox item owner. For more information, see ["UpdateInboxOwnerInfo Method" on page 171](#).
- 4 **IsSRClosed, DeactivateInboxOwner, and DeactivateInboxOwnerManager.** If the service request is closed, then these steps call the DeactivateInboxItem method to deactivate Inbox item owners for the owner of the service request and their manager. For more information, see ["DeactivateInboxItem Method" on page 168](#).

## Inbox Trigger Used in ESS

This topic includes a sample of SmartScript code.

This code is entered in the Script\_Finish statement of the ESS Form (SmartScript). It can be accessed from the Administration - SmartScript screen, then the Scripts view in the HelpDesk application. For more information about Employee Self Service, see *Siebel HelpDesk Guide*.

The purpose of the script is to take data from the ESS Form (SmartScript) and some required arguments to invoke the Universal Inbox business service under the Initialize method. When the user submits the ESS Form (SmartScript), this eScript code is launched, invoking the Universal Inbox business service, and using the parameters specified in the eScript and the Inbox type to create an Inbox item.

```

function Script_Finish ()
{
    var szScriptSessionId;
    var szRequester;
    var svc;
    var indata;
    var outdata;
    var ssPage;

```

```

var ssQuestion;
var EmployeeLastName;
var EmployeeFirstName;
var RequestedChange;
var PAFComments;
var PAFPriority;
var szSSLanguageCode;
var szSSCurrencyCode;

ssPage = GetPage("PAF Which Change");
ssQuestion = ssPage.GetQuestion("Display Employee Last Name");

EmployeeLastName = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("Display Employee First Name");
EmployeeFirstName = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("PAF Change Requested");
RequestedChange = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("PAF Comments");
PAFComments = ssQuestion.GetCurrentValue();
ssQuestion = ssPage.GetQuestion("PAF Priority");
PAFPriority = ssQuestion.GetCurrentValue();

// Cancel saving everything to the database
Cancel ();

indata = TheApplication ().NewPropertySet ();
outdata = TheApplication ().NewPropertySet ();

// Get the login name of the user
szRequester = TheApplication ().LoginName ();
// Get SmartScript Save Session table ID.
szScriptSessionId = GetSessionId ();

szSSLanguageCode = GetParameter("Language");
szSSCurrencyCode = GetParameter("Currency");

indata.SetProperty ("SmartScriptLanguageCode", szSSLanguageCode);

// ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
// required input arguments for the "Universal Inbox.Initialize"
indata.SetProperty ("ItemObjectId", szScriptSessionId);
// Item Type is the Approvals Inbox type defined in the
// Approvals Inbox Administration screen
indata.SetProperty ("ItemType", "Personnel Action Form");
// Short Description of the inbox item
indata.SetProperty ("ItemDescription", RequestedChange + " PAF" + " for " +
EmployeeFirstName + " " +
EmployeeLastName);

indata.SetProperty ("ItemSubmittedBy", szRequester);

// ItemQueueDuration, ItemPriority, and ItemComments are the
// optional input arguments for the "Universal Inbox.Initialize"
indata.SetProperty ("ItemQueueDuration", "129600");
indata.SetProperty ("ItemPriority", PAFPriority);
indata.SetProperty ("ItemComments", PAFComments);

```

```

    svc = TheApplication ().GetService ("Universal Inbox");
    svc.InvokeMethod("Initialize", indata, outdata);
}

```

## Inbox Trigger Using Server Script

This topic includes a sample Server Script that calls Inbox methods.

This code is entered in the PreWriteRecord statement for the Project business component in Siebel Tools. The purpose of this code is to take data from the project record and some required arguments to invoke the Universal Inbox business service under the Initialize method. When the user changes the value of the Status field to For Approval, this eScript code is launched, invoking the Universal Inbox business service and using the parameters specified in the eScript and the Inbox type to create an Inbox item.

```

function BusComp_PreWriteRecord ()
{
    var FldProjectStatus = this.GetFieldValue("Status");

    if (FldProjectStatus == "For Approval")
    {
        var szScriptSessionId;
        var szRequester;
        var svc;
        var indata;
        var outdata;

        indata =TheApplication ().NewPropertySet ();
        outdata = TheApplication ().NewPropertySet ();

        // Get the login name of the user
        szRequester = TheApplication ().LoginName ();

        // ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
        // required input arguments for the "Universal Inbox.Initialize"
        var FldProjectNum = this.GetFieldValue("Project Num");
        indata.SetProperty ("ItemObjectId", FldProjectNum);
        // Item Type is the Approvals Inbox type defined in the
        // Approvals Inbox Administration screen
        indata.SetProperty ("ItemType", "ChangeManagement");
        // Short Description of the inbox item
        indata.SetProperty ("ItemDescription", FldProjectNum);
        indata.SetProperty ("ItemSubmittedBy", szRequester);

        // ItemQueueDuration, ItemPriority, and ItemComments are the
        // optional input arguments for the "Universal Inbox.Initialize"
        indata.SetProperty ("ItemQueueDuration", "129600");
        indata.SetProperty ("ItemPriority", "High");
        indata.SetProperty ("ItemComments", "Change Management Project");
        svc = TheApplication ().GetService ("Universal Inbox");
        svc.InvokeMethod("Initialize", indata, outdata);
    }
}

```

```
        return (ContinueOperation);  
    }
```

# 14 Messages

This chapter describes the administrative setup tasks to perform before the Messages screen and views are used, and explains how users create, view, sort, and send messages. It includes the following topics:

- [Scenario for Setting Up Messages on page 183](#)
- [About Using Messages on page 184](#)
- [About Email and Screen Alerts on page 184](#)
- [Process of Setting Up and Using Messages on page 185](#)
- [Setting Up Messages on page 185](#)
- [Creating a New Message \(End User\) on page 185](#)
- [Setting Up Single and Recurring Alerts \(End User\) on page 187](#)
- [Viewing Messages \(End User\) on page 187](#)
- [Sorting Messages by Intervals \(End User\) on page 188](#)
- [Sending a Message Using Email \(End User\) on page 188](#)

## Scenario for Setting Up Messages

This topic gives one example of how message setup might be used. You might use message setup differently, depending on your business model.

A corporation has hired four new sales representatives. The Siebel administrator must set up message functionality for these new employees. The administrator sets up accounts for each new sales representative and checks to make sure that the Communications Management and the Workflow Management component groups are enabled.

Next, the administrator activates the Messages workflow policies and the appropriate workflow processes.

The administrative assistant for the sales representatives receives a message for a sales representative, either by phone or by voice mail. Instead of writing the message out by hand, the administrative assistant enters the message in the Messages screen and assigns the message to the sales representative.

The administrative assistant associates the message with an existing account, adds information in the Comments field, and attaches a spreadsheet file to the message. The administrative assistant then prioritizes the message and send it either as an email or a screen alert.

By default, a message is marked private, and only the administrative assistant and sales representative can review the message. The administrative assistant can alternatively choose not to mark the message private, and then any individual with access to the account, activity, contact, opportunity, or service request associated with the message can view it.

## About Using Messages

Users, such as sales representatives and call center agents, can use messages to communicate with others who also use Siebel Business Applications. They can create messages, view and sort messages, and associate activities and other items with messages. Using messages allows users to maintain a history of the communication associated with a contact, account, opportunity, or information request.

**NOTE:** The messages functionality is unrelated to notifications and alerts. For more information, see *Siebel Fundamentals* and [Chapter 11, “Alerts.”](#)

## About Email and Screen Alerts

There are two types of message alerts you can establish to send screen or email and screen alerts. You can set up email and screen alerts for messages and individuals to whom you delegate message-related activities, and perform the following tasks:

- Set up an alert for an individual to whom you routinely send messages.  
For example, you routinely send messages to the same individuals, and you want to set up a standard alert method to let them know you have sent a message.
- Set up an alert for a single message so the recipient receives an alert.  
For example, you send a message to an individual for whom you have not set up a message alert, but you can also set up an alert for the individual message.

You can opt to receive both email alerts and screen alerts simultaneously.

**Email Alerts.** A message generates an email alert when the following events occur:

- A message is created and the Alert Type field has a value of Email or Email and Screen Alert.
- A message is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you by a contact or employee.
- An activity is assigned to you, and you have set up an alert to receive email when messages or activities are assigned to you.
- You send an email from your Siebel application.

**Screen Alerts.** A message generates a screen alert when the following events occur:

- A message is created and the Alert Type field of the Messages form has a value of Screen Alert or Email and Screen Alert.
- A message is assigned to you, and you have set up an alert to receive a screen alert when messages or activities are assigned to you by a contact or employee.



- An activity is assigned to you, and you have set up an alert to receive a screen alert when messages or activities are assigned to you.

## Process of Setting Up and Using Messages

To set up and use messages, perform the following tasks:

- [“Setting Up Messages” on page 185](#)
- [“Creating a New Message \(End User\)” on page 185](#)
- [“Setting Up Single and Recurring Alerts \(End User\)” on page 187](#)
- [“Viewing Messages \(End User\)” on page 187](#)
- [“Sorting Messages by Intervals \(End User\)” on page 188](#)
- [“Sending a Message Using Email \(End User\)” on page 188](#)

## Setting Up Messages

Administrators must set up workflows for the Messages screen and views before a new employee can have email access. For detailed information about how to set up workflows, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** Make sure that users have the Message User responsibility so that they can access Messages views. For more information about setting responsibilities for users, see *Siebel Security Guide*.

This task is a step in [“Process of Setting Up and Using Messages” on page 185](#).

### *To set up workflows for the Messages screen and views*

- 1 Make sure that the Communications Management and the Workflow Management component groups are enabled.
- 2 Activate the Messages workflow policies, and remove the expiration dates as necessary.  
All Messages workflow policies are in the Siebel Messaging policy group.
- 3 Activate the following workflow processes:
  - Siebel Message send email
  - Siebel Message send email for activity owner

## Creating a New Message (End User)

You can create a message using the Message screen.

This task is a step in [“Process of Setting Up and Using Messages” on page 185](#).

**To create a new message**

- 1 Navigate to the Messages screen, then the Messaging List view.
- 2 In the Messaging List, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field          | Comments                                                                                                                                                                                                                                               |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date/Time      | Displays the month, day, year and the hour, minute, second that the message was created. You can edit this field.                                                                                                                                      |
| Last Name      | Select the name of the contact to be the message recipient. After a record is saved, you can drill down on this field to navigate to Contacts and More Info.                                                                                           |
| First Name     | Displays the first name of the contact record that you select.                                                                                                                                                                                         |
| Work Phone #   | Displays the business telephone number of the contact record that you select.                                                                                                                                                                          |
| Mobile Phone # | Displays the mobile telephone number of the contact record that you select.                                                                                                                                                                            |
| Email          | Displays the email address of the contact record that you select.                                                                                                                                                                                      |
| Priority       | Select a value to indicate the message priority. Default values include 1-ASAP, 2-High, 3-Medium, and 4-Low.                                                                                                                                           |
| Status         | Select a value to indicate the message status. Default values include New, Read, Delegated, Return Call, and Completed.                                                                                                                                |
| Message        | Type the content of the message.                                                                                                                                                                                                                       |
| Assigned To    | Select the name of the individual to whom you are assigning the message. You can select a default value in the Default Assigned To field in the User Preferences screen. For more information about user preferences, see <i>Siebel Fundamentals</i> . |
| Comment        | Type optional text field for additional information.                                                                                                                                                                                                   |
| Account        | Select the account associated with the message, if applicable.                                                                                                                                                                                         |
| Opportunity    | Displays the Opportunity associated with the message, if applicable. You can select an opportunity.                                                                                                                                                    |
| Alert Type     | Select a value to indicate the alert type for the message. Default values include None, Email, Screen Alert, and Email and Screen Alert.                                                                                                               |
| Private        | Select the check box to permit only the message creator and recipient to view the message. Clear the check box to permit team members associated with the opportunity, account, contact, and service request to view the message.                      |
| SR #           | Select the Service Request number associated with the message, if applicable.                                                                                                                                                                          |
| Home Phone #   | Displays the home telephone number of the contact record that you select.                                                                                                                                                                              |

## Setting Up Single and Recurring Alerts (End User)

You can set up an ongoing alert type for an individual. This individual always receives an alert when you assign a message to this individual.

This task is a step in [“Process of Setting Up and Using Messages” on page 185](#).

### *To set up a recurring message alert*

- 1 Navigate to the Messages screen, Messaging List, and then the Message Alert Setup view.
- 2 In the Message Alerts Setup list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field      | Comments                  |
|------------|---------------------------|
| Last Name  | Select the contact name.  |
| Alert Type | Select the type of alert. |

### Sending a Single Message Alert

You also can assign an alert to a single message to notify the recipient of a message. You can assign this alert either while you are creating the message or after you have saved the message.

### *To send a single message alert*

- 1 Navigate to the Messages screen, Messaging List, then the Daily Messages view.
- 2 In the Daily Messages list, create a new record, and complete the necessary fields.
- 3 In the form at the bottom of the view, select the type of alert to assign to the message in the Alert Type field.

## Viewing Messages (End User)

You can view messages assigned to you using your Siebel application.

This task is a step in [“Process of Setting Up and Using Messages” on page 185](#).

### *To view messages assigned to you*

- 1 Navigate to the Messages screen, then the Messaging List view.
- 2 In the Messaging list, select the message to read.
- 3 In the Message Details form, review the text in the Message field.

## Viewing Messages Created by You

You can view messages created by you using your Siebel application.

### *To view messages created by you*

- 1 Navigate to the Messages screen, Messaging List, then the All Messages view.
- 2 In the All Messages list, use Columns Displayed option in the menu for the cogwheel icon to display the Created By field.
- 3 In the All Messages list, query for the messages that you created by using the Created By field.
- 4 In the All Messages list, sort the messages by the Date/Time field.

## Sorting Messages by Intervals (End User)

Use the appropriate view to sort messages into Daily, Weekly, or Monthly lists. You also can use queries to achieve the same result. The default query for the Messaging list displays all messages, but you can select predefined Daily, Weekly, or Monthly queries to refine your lists.

This task is a step in [“Process of Setting Up and Using Messages” on page 185](#).

### *To sort messages by intervals*

- 1 Navigate to the Messages screen, Messaging List, then the Daily Messages view.  
A list of messages you received today appears in the Messaging list.
- 2 In the drop-down lists for the Date field, enter the date for which you want to find messages, and then click Go.  
A list of messages for the specified date appears.
- 3 Click Today to see the messages for the current date.
- 4 Navigate to the Weekly Messages view to see messages you received in the previous seven-day interval.
- 5 Navigate to the Monthly Messages view to see messages you received in the last 30 days.

## Sending a Message Using Email (End User)

You can send email messages to the recipient from within Siebel application. The recipient either can be inside or outside your corporate firewall because the Siebel application uses the email address associated with the contact information for the recipient. After you create a message and complete the necessary fields, you can send the message as an email. For information about standard email functionality within Siebel Business Applications, see *Siebel Fundamentals*.

This task is a step in [“Process of Setting Up and Using Messages” on page 185](#).

***To send an email message***

- 1** Navigate to the Messages screen.
- 2** In the Messaging list, select the message to send as an email message.
- 3** From the application-level menu, select File, then Send Email.
- 4** In the Pick Recipient dialog box that appears, select the email recipient, and click OK.
- 5** In the Send Email dialog box that appears, complete the necessary fields for the email, and click Send.



# 15 Activities

This chapter contains information about activities. It includes the following topics:

- [About Activities on page 191](#)
- [Creating Activities \(End User\) on page 193](#)
- [Working with Others' Activities \(End User\) on page 195](#)
- [Delegating an Activity \(End User\) on page 196](#)
- [Viewing Activities Associated with Another Record Type \(End User\) on page 197](#)
- [About Configuring Owner and Employee Fields for Activities on page 197](#)

## About Activities

Siebel Business Applications use activities to organize, track, and resolve a variety of tasks, from finding and pursuing opportunities to closing service requests. If a task requires multiple steps that one or more people might complete, then activities simplify the job. Activities can help:

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

The major advantages of breaking down a task into one or more activities include:

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

Activities are used to represent tasks in many situations such as scheduling and recording meetings, appointments, and interactions with customers and prospects. If one task leads to follow-up tasks, then you can associate follow-up activity records with a parent activity record.

Activities can be viewed in several different locations, including the following:

- **My To Do List in the Activities screen.** This list shows all the user's activities, regardless of status. Access this list by navigating to the Activities screen and choosing My To Do List from the visibility filter.
- **My To Do's in the Calendar screen.** This list displays a subset of the data that appears in the My To Do List in the Activities screen, activities that have not been completed. For general information about using the Calendar screen, see *Siebel Fundamentals*.

## Assignment Methods

Activities are assigned to employees. Activity assignment can occur in the following ways:

- Manual assignment.
- Automatic assignment to the creator of the activity (by populating the Owner field with the user ID of the activity's creator).
- Automatic assignment using Assignment Manager. For more information, see *Siebel Assignment Manager Administration Guide*.

## Business Objects Associated with Activities

Siebel activity objects can be associated with other Siebel business objects. [Table 56](#) lists some common associations. In most cases, this association is with a set of activities defined by an activity plan and individual (or stand-alone) activities. In a few cases, an object is associated either with an activity template or with stand-alone activities (not both).

Table 56. Association of Activity Object with Other Siebel Objects

| Screen Name                    | Business Object   | Stand-Alone Activities | Activities from Templates |
|--------------------------------|-------------------|------------------------|---------------------------|
| Accounts                       | Account           | Yes                    | Yes                       |
| Agreements                     | Service Agreement | Yes                    | Yes                       |
| Assets                         | Asset Management  | Yes                    | No                        |
| Campaigns                      | Campaign          | Yes                    | No                        |
| Contacts                       | Contact           | Yes                    | Yes                       |
| Messages                       | Messaging         | Yes                    | No                        |
| Opportunities                  | Opportunity       | Yes                    | Yes                       |
| Orders (Order Line Items view) | Order Entry       | Yes                    | Yes                       |
| Preventive Maintenance         | FS PM Plan Item   | No                     | Yes                       |
| Programs                       | Program (DBM)     | No                     | Yes                       |
| Projects                       | Project           | Yes                    | Yes                       |
| Quality                        | Product Defect    | Yes                    | No                        |
| Repairs                        | FS Repair         | Yes                    | Yes                       |
| References                     | Reference         | Yes                    | No                        |
| Service                        | Service Request   | Yes                    | Yes                       |



## Creating Activities (End User)

Using activities, you can assess the investment in time and resources to maintain and grow account relationships. Sales managers also have a record of the activities of their sales representatives as they manage account relationships. Sales teams can use activities to avoid duplicating efforts across the team, and to share information about pending and completed activities.

Activities that are assigned specific dates and times appear on both the Activities and the Calendar screens. For more information, see *Siebel Fundamentals*.

**NOTE:** The My To Do filter allows you to view each activity that has been designated as a To Do item using the Display In field. Select My To Do List from the visibility filter to access this feature. You can further refine the To Do List by using the predefined queries that appear in the Queries drop-down list. For example, if you select the Uncompleted Activities query, then the To Do items that do not have a status of Done appear. You can also view uncompleted To Do items in the To Do list that appears on the calendar screen. This list, by default, shows only To Do items that are not yet complete.

### To create an activity

- 1 Navigate to the Activities screen, then the Activity List view.
- 2 In the Activity List, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                                                                                                                                                                               |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New         | Displays a star when ownership is changed from the activity creator to another user. This field is automatically cleared when the new owner views activity details by drilling down on the Type field. |
| Description | Type text for additional information about the activity.                                                                                                                                               |
| Type        | Select the activity type. Default values include Call, Correspondence, and Email.                                                                                                                      |
| Account     | Select the account associated with the activity.                                                                                                                                                       |
| Due         | Select the date and time by which the activity must be completed.                                                                                                                                      |
| Status      | Select a status for the activity. Default values include Acknowledged, Cancelled, Declined, Scheduled, and Completed.                                                                                  |
| Priority    | Select a value for the priority for the activity. Default values include 1-ASAP, 2-High, 3-Medium, and 4-Low.                                                                                          |
| Comments    | Type text for activity notes and information to share with the team.                                                                                                                                   |
| Start       | Select the date and time for the activity creation.                                                                                                                                                    |
| Duration    | Select a value for the duration of the activity. Default values are in minute segments, for example 5, 10, 15, and 20.                                                                                 |
| End         | Select the proposed date and time for the activity completion.                                                                                                                                         |

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Private          | Select the check box to indicate the activity is visible only to the users listed in the Employees field and the Siebel administrator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Opportunity      | Select an opportunity for the activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Owner            | Select the primary employee associated with the activity. The default value is the user ID for the creator of the activity. The new Owner value that you select replaces the primary employee that appears in the Employee field. Conversely, if you add a new primary to the Employee field, then this new primary appears in the Owner field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Employees        | Select the user ID of the activity creator. You can select multiple employees for an activity, but only one employee can be designated as primary.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Display In       | <p>Select a value that determines where an activity appears. The field has the following values: Calendar and Activities, To Do and Activities, Activities Only, Communication and Activities. For example, if you want an activity to appear in your calendar, then you must set the Display In field to Calendar and Activities, and make sure that the activity has a start time.</p> <p>If you set the Type field to To Do, then the Display In field automatically changes to To Do and Activities. On the home page, To Do activities appear in the My Activities list and do not appear in the My Calendar list.</p> <p>If you select Communication and Activities and Email - Inbound type, then the activity appears in the Comm Inbound Item List Applet in the Inbound Item List view of the Communications screen.</p> |
| Billable         | Select the check box to indicate the activity is a revenue-generating event.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Alarm            | Select the check box to set the activity reminder. A reminder dialog box appears when the activity is due. You can either set an alarm for an individual activity, or you can set a default alarm for all your activities. For more information, see <i>Siebel Fundamentals</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Repeat Until     | Select the date and time for the last interval of the final meeting in the series.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Repeat Frequency | Select a value for the interval at which the activity repeats. Default values include daily, weekly, monthly, and yearly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Created          | Displays the date and time the activity was created.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Created By       | Displays the user ID of the activity creator.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

- 3 Drill down on the Type field of the record, and navigate to the More Info view to complete more fields.

Some fields are described in the following table.

| Field            | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity #       | Displays the account number associated with the selected account.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Global Owner     | Select the employee who is responsible for the activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Meeting Location | Type the location information to share with the sales team. Examples of meeting locations are Conference Room B and Main Campus Facility.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Cost Estimate    | Type the monetary value associated with the activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Price List       | Select the price list that is associated with a billable activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Rate List        | Select the rate list associated with a billable activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Project          | Select the project for the activity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Category         | Select a value to specify a category for the activity.<br><br>Service related activities are often created by one individual (such as a call center agent) and completed by another individual (such as a service repair representative). Consequently, when a service related category value is selected (such as Diagnostic, Field Engineer Activity, Preventative Maintenance or Other), the owner of the activity is deleted so that the activity is unassigned. The user can then reassign the activity by adding a new value to the owner field. If you are using Siebel Assignment Manager, then the activity is automatically reassigned. |
| Audience         | Select a value to specify the audience that can view the activity. Examples of values are employees, partners, and customers.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Working with Others' Activities (End User)

The following procedure describes how to work with another user's activity records, if that user has granted you permission to do so. For information about how to grant permission for another user to work with your activity records, see information about granting access to your calendar in *Siebel Fundamentals*.

### To work with another user's activity records

- 1 Navigate to the Activities screen, then the Others' Activities List view.

- 2 In the drop-down list in the header, select the user whose activities you want to work with, and click Go.

If you have add-and-modify access to the records, then the icon to create activities is available, and you can work with these records as your own. If you have not been granted permission to make changes, then this icon is inactive.

## Delegating an Activity (End User)

If you work as part of a sales team or you are a sales manager, then you might manage the activities of other people. You can delegate an activity to another member of the sales team, an employee, or a partner.

### *To delegate an activity*

- 1 Navigate to the Activities screen, then the Activity List view.
- 2 Select the activity that you want to delegate.
- 3 In the Owner field, select the individual to whom to assign the activity.

## Reassigning or Removing Ownership of an Activity Using Employee Field

Complete the following procedure to reassign or remove ownership of an activity using the Employee field.

### *To reassign or remove ownership of an activity using the Employee field*

- 1 Navigate to the Activities screen, then the Activity List view.
- 2 Select the activity that you want to reassign.
- 3 In the Employees field, add or remove employees as required, and designate one of the employees as the primary employee.

## Assigning an Activity Using Assignment Manager

Complete the following procedure to assign an activity using Assignment Manager.

### *To assign an activity using Assignment Manager*

- 1 Navigate to the Activities screen, then the Activity List view.
- 2 Select the activity that you want to reassign.
- 3 In the form, click the cogwheel icon, and select Assign.

- 4 In the Employees dialog box, select an employee to assign the activity to.

**NOTE:** If the delegator uses Siebel Assignment Manager to reassign an activity, then the delegator is automatically removed from the employee list.

## Viewing Activities Associated with Another Record Type (End User)

For example, users researching service requests can review the activities related to the selected service request in the Service Request Detail view. This view lists the completed and scheduled activities for the service request.

The procedure in this topic uses the Service Request screen as an example, but many other screens also have activity views.

### *To view activities for a service request*

- 1 Navigate to the Service Requests screen, then the Service Request List view.
- 2 Drill down on the SR # (number) field of a service request record.
- 3 Navigate to the Activities view.

The Activities list represents every scheduled task for the selected service request and the service request history.

- 4 (Optional) Create a new activity, and complete the necessary fields.
- 5 To see more information about an activity, drill down on the Type field of the activity record.

## About Configuring Owner and Employee Fields for Activities

Depending on your business process, you might want to configure the Siebel application so that the Employees and Owner fields for activities are *always* left blank when the activity is created. (The Owner field displays the primary from the Employee field.) Use Siebel Tools to set the predefault value of the Primary Owned By field (which maps to the Owner field that appears in the UI) in the Action business component to blank.



# 16 Activity Plans and Sales Methods

This chapter contains information about activity plans, activity templates, sales methods, and sales stages. It includes the following topics:

- [About Activity Templates and Activity Plans on page 199](#)
- [About Sales Methods on page 200](#)
- [About Activity Assignment on page 200](#)
- [Scenario for Managing Activity Plans on page 201](#)
- [Process of Administering and Using Activity Plans on page 202](#)
- [Defining a Sales Methodology on page 202](#)
- [Creating an Activity Template on page 204](#)
- [Creating TAS Customer Milestone Templates in a Localized Application on page 206](#)
- [Deleting an Activity Template on page 207](#)
- [Setting a Default Sales Methodology \(End User\) on page 208](#)
- [Using an Activity Plan \(End User\) on page 208](#)

## About Activity Templates and Activity Plans

*Activity templates* are created by an administrator and are blueprints for sets of activities. Activity templates can be invoked by users to create activity plans. For information about creating activity templates for field service activities, see *Siebel Field Service Guide*.

You can select an appropriate activity template for the goal you want to achieve, which generates a list of activities associated with the activity template. This generated list of activities is an *activity plan*. An activity plan saves you from creating a new list of activities for each sales call, corporate visit, and special event. Typically, activity plans incorporate a company's best practices. Using activity plans, you can locate, assign, schedule, and track the progress of related activities.

For example, the following list of activities can serve as an activity template for a corporate visit with clients for product demonstrations:

- Book a conference room.
- Set an agenda.
- Confirm the date and time with the customer.
- Make arrangements for presenters.

This set of tasks, when defined as a template and applied to create the activity plan, helps sales team members follow the steps your company recommends to prepare for a corporate visit. The list drives critical tasks and defines the recommended lead time for each activity within the template.

Each activity template is associated (through its Type value) with a certain business object. See [Table 56 on page 192](#) for a list of business object and screens that use activity templates. In activity plans views, only activity templates that have been associated with the active business object can be invoked. For example, on the Opportunity screen, only templates for opportunity activities are visible. Selecting a template creates all the activities defined by that template.

## About Sales Methods

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

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

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

## About Activity Assignment

Activities created using activity templates can be automatically assigned to:

- The employee who is specified in the template.
- The employee who uses activity templates to create the activity. (This assignment is usual in a sales situation.)
- No employee. (This assignment is recommended when Assignment Manager is used to assign the activity.)



Table 57 shows how the values in the Employee and Category fields of the activity record in the Activity Template Details list determine the assignment.

Table 57. Employee and Category Values for Activity Assignment

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

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

## Scenario for Managing Activity Plans

This topic gives one example of how activity plan management might be used. You might use activity plan management differently, depending on your business model.

A sales organization has adopted a new sales methodology to improve the effectiveness of its salespeople. The business analyst has provided the administrator with a detailed document describing the sales method, the stages of the method, and the activities that each salesperson performs at each stage of the deal. The outline of the document looks as follows:

### Our New Sales Method

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

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

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

Because the salespeople enter their own opportunity records, the administrator sets up the activity template details so that the salesperson who enters the opportunity is automatically assigned ownership of the activities.

Salespeople set their user preferences to specify that their default sales methodology is the New Sales Method, so that this methodology is automatically populated when they create their opportunities.

When salespeople enter their opportunity records and specify a sales stage, the activity template for that stage automatically generates and assigns the activities appropriate for the stage. Because lead times were set up in the activity template details, the due dates for the activities are automatically calculated using the date for the opportunity sales stage.

## Process of Administering and Using Activity Plans

To administer and use activity plans and sales methods, complete the following tasks:

- [“Defining a Sales Methodology” on page 202](#)
- [“Creating an Activity Template” on page 204](#)
- [“Creating TAS Customer Milestone Templates in a Localized Application” on page 206](#)
- [“Deleting an Activity Template” on page 207](#)
- [“Setting a Default Sales Methodology \(End User\)” on page 208](#)
- [“Using an Activity Plan \(End User\)” on page 208](#)

## Defining a Sales Methodology

Creating a sales methodology includes the following parts:

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

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

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

This task is a step in [“Process of Administering and Using Activity Plans” on page 202](#).

**To create a sales method and associated sales stages**

- 1** Navigate to the Administration - Data screen, then the Sales Methods view.
- 2** In the Sales Methods list, create a new record, and complete the necessary fields.
- 3** In the Sales Stages list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

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

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

Before the Sales Method and Sales Stage can be used, the cache might need refreshing. For more information, see [“Clearing the Cache” on page 68](#).

## Creating an Activity Template

You use the Activity Templates view of the Administration - Data screen to create activity templates. For information about creating service activity templates using the Service Details view, see *Siebel Field Service Guide*.

This task is a step in [“Process of Administering and Using Activity Plans” on page 202](#).

### **To create an activity template without grandchild records**

- 1 Navigate to the Administration - Data screen, then the Activity Templates view.

- 2 In the Activity Templates list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Stage  | <p>If you are creating a template of type Opportunity, then select the sales stage with which you want to associate the activity template. When the sales stage is selected, the Sales Method field is automatically populated.</p> <p>When this sales stage (and sales method) are specified for an opportunity and Auto Trigger is selected, the activity template is used to automatically populate the Activity Plan view for that opportunity. For information about creating sales stages and methods, see <a href="#">“Defining a Sales Methodology” on page 202</a>.</p> |
| Type         | <p>Select a value that specifies where you want the template to be available. For example, select Account if you want to use this template to create activity plans for accounts, or Milestone for TAS customer milestones.</p> <p>The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see <a href="#">Chapter 5, “Working with Lists of Values.”</a></p>                                                                                                                                      |
| Sales Method | Displays a value when the sales stage is selected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Public       | Ignore this field. There is no logic associated with it. You might choose to use it in conjunction with workflows and search specifications.                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Auto Trigger | If you are creating a template of type Opportunity, then select the check box to have the activity plan automatically generated for opportunities with this sales stage.                                                                                                                                                                                                                                                                                                                                                                                                         |

- 3 Navigate to the Activity Template Details view.

- 4 In the Activity Templates Details list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field      | Comments                                                                                                                                                                                                                                    |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type       | Select a value for the type of activity template. The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values. For more information, see <a href="#">Chapter 5, “Working with Lists of Values.”</a> |
| Duration   | Select the time needed to complete the activity. This field determines the end time for the activity.                                                                                                                                       |
| Lead Time  | Type the lead time for the activity.                                                                                                                                                                                                        |
| Lead Units | Select the units of time to measure the lead time of the activity.                                                                                                                                                                          |
| Employees  | Select the user names of the people who are to perform the activity. For more information, see <a href="#">“About Activity Assignment” on page 200</a> .                                                                                    |

| Field           | Comments                                                                                                                                                                                                  |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Alarm           | Select the check box to indicate an alarm sounds when it is time for the activity.                                                                                                                        |
| Category        | Select the category for the activity. For more information, see <a href="#">“About Activity Assignment” on page 200</a> .                                                                                 |
| Lock Assignment | Select the check box to indicate the Employees field is locked so that assignment cannot be changed by Assignment Manager. (Assignment can still be manually changed, for example, by the administrator.) |
| Required        | Select the check box to indicate that the activity must be completed. This field is for information only; there is no associated code.                                                                    |
| Display In      | Select a value to display the activity in the Calendar screen, the Activity screen, or in both screens.                                                                                                   |
| Breakable       | Select the check box to indicate breaks are permitted during the activity. This field is an input parameter to Siebel Scheduler. For more information, see <i>Siebel Field Service Guide</i> .            |
| Lock Schedule   | Select the check box to lock the schedule for the activity. This field is used for service activity templates. For more information, see <i>Siebel Field Service Guide</i> .                              |
| Work Time       | Type the work time for the activity. This field is used for service activity templates. For more information, see <i>Siebel Field Service Guide</i> .                                                     |

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

## Creating TAS Customer Milestone Templates in a Localized Application

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

This task is a step in [“Process of Administering and Using Activity Plans” on page 202](#).

### ***To translate a TAS Customer Milestone template for a localized application***

- 1 Navigate to the Application - Data screen, then the Activity Templates view.

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

**NOTE:** For the translation, see the Interface Terminology Look-up manual for your language, or, in the List of Values, look for the Display Value that corresponds to the Language-Independent Code for Milestone. For more information about List of Values, see [Chapter 5, “Working with Lists of Values.”](#)

The query finds the following six records:

- 1-Request Offering(s)
  - 2-Evaluate Offering(s)
  - 3-Approve / Select
  - 4-Legal / Purchasing
  - 5-Implement
  - 6-Measure
- 3 For each of the six templates, complete the following steps:
    - a Navigate to the Activity Templates Detail view.
    - b Make sure that for each detail record, the Type is *Recommended Activity* where *Recommended Activity* is the translation of the English phrase in the localized language. (See note in [Step 2.](#))
    - c (Optional) Translate the Description of each detail record into the localized language.
  - 4 Add a milestone, and make sure that the six Activity Templates appear in the Event field drop-down list.

For more information, see [“Adding Customer Milestones” on page 426.](#)

## Deleting an Activity Template

You can delete an activity template.

**NOTE:** If you delete an activity template, then the activities associated with activity plans that reference the template are not deleted. However, the reference to the activity template from the activity is deleted.

This task is a step in [“Process of Administering and Using Activity Plans” on page 202.](#)

### **To delete an activity template**

- 1 Navigate to the Administration - Data screen, then the Activity Templates view.
- 2 In the Activity Templates list, select and delete the activity template record.

## Setting a Default Sales Methodology (End User)

Users can set a default sales methodology in their preferences so that each time they create a new opportunity, their default sales methodology is populated for the opportunity record.

This task is a step in [“Process of Administering and Using Activity Plans” on page 202](#).

### *To set a default sales methodology*

- 1 From the application-level menu, select Tools, then User Preferences.
- 2 Navigate to the Price List & Sales Methodology view.
- 3 In the Sales Methodology field, select the methodology that you want to have as the default.

## Using an Activity Plan (End User)

An activity plan defines the activities needed to implement a project or goal, or to resolve issues that frequently occur. For example, if a service-oriented activity plan is associated with a service request, then the plan might include a standard set of activities required to resolve the SR.

Activity plans use activity templates that establish the list of activities to be completed. Activity templates, created by administrators, can have various levels of details pertinent to each member of a team, such as requisitioning parts and tools, steps involved in the service activities, or special directions or instructions.

After an agent selects an activity plan, the steps are in place to help diagnose and resolve the customer's issues, and the agent can move to the next customer call. Either Assignment Manager or an administrator can assign the activities to the appropriate users.

This task is a step in [“Process of Administering and Using Activity Plans” on page 202](#).

### *To create activities associated with an activity plan*

- 1 Navigate to the Service Requests screen, then the Service Request List view.
- 2 In the Service Request list, select the service request, and drill down on the SR # (number) field.
- 3 Navigate to the Activity Plans view.
- 4 In the Activity Plans list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field         | Comments                                                                      |
|---------------|-------------------------------------------------------------------------------|
| Planned Start | Select the start date and time for activities related to the service request. |
| Template      | Select the appropriate activity template for the service request.             |



**5** Save the activity plan.

Activities associated with the plan automatically appear in the Activities view.



# 17 Assessments

This chapter contains information about assessments. It includes the following topics:

- [About Assessment Templates on page 211](#)
- [Scenario for Using and Administering Assessments on page 211](#)
- [Process of Administering and Using Assessments on page 212](#)
- [Creating an Assessment Template on page 212](#)
- [Performing an Assessment \(End User\) on page 214](#)
- [Assessing an Opportunity for Target Account Selling \(End User\) on page 215](#)

## About Assessment Templates

An assessment template is a model used to generate an assessment. Assessment templates can be created to assess opportunities, contacts, and accounts, as well as other areas of the Siebel Business Applications.

Assessments ask questions (in the form of attributes) and score the answers to determine a single total score or percentage, which measures or ranks an opportunity, a contact, an account, and so on.

Assessments are made up of one or more attributes. Each attribute has a name, a weight, a set of allowable values and a description field. For example, a common attribute for an account might be Credit History. The values for this attribute might include Excellent, Good, Average, and Poor. Each of these values carries a numerical score and, optionally, instructions for the user on how to select the correct value.

Typically, the administrator creates assessment templates, and users apply the templates and complete the assessments.

## Scenario for Using and Administering Assessments

This topic gives one example of how assessments might be used. You might use assessments differently, depending on your business model.

A sales organization has adopted a new sales methodology to improve the effectiveness of its salespeople. The business analyst has provided the administrator with a detailed document describing the sales method.

Because the salespeople have too many opportunities to deal with at once, they prioritize their opportunities. To help them prioritize, the business analyst has created a standardized assessment document that he recommends all salespeople use to rank their opportunities. The outline of assessment document looks as follows:

#### Assessing a Lead at the Qualification Stage

- > Attribute 1: Adaptability to New Technology, weight = 5
- ✓ Attribute 2: Number of potential users, weight = 7
  - 0 to 50, score = 0, Too small
  - 51 to 100, score = 1, Route to telesales
  - 101 to 500, score = 2, Route to middle market
  - more than 500, score = 6, Pursue aggressively
- ✓ Attribute 3: Sponsor's stance, weight = 10
  - Adversarial, score = -5, Strongly against us
  - Weak, score = 0, Neutral or slight favor another vendor
  - Moderate, score = 5, Willing to recommend our product
  - Strong, score = 10, Believes we are the best choice
- > Attribute 4: Lead's purchase profile and history, weight = 5

The administrator uses the information in this document to create an assessment template associated with the qualification stage. When a salesperson reaches the qualification stage of the deal, the Assessments view for that opportunity is automatically populated with the questions that need answers to assess and prioritize the opportunity.

## Process of Administering and Using Assessments

To administer and use assessments, complete the following tasks:

- ["Creating an Assessment Template" on page 212](#)
- ["Performing an Assessment \(End User\)" on page 214](#)
- ["Assessing an Opportunity for Target Account Selling \(End User\)" on page 215](#)

## Creating an Assessment Template

You use the Sales Assessment Templates view of the Administration - Data screen to create assessment templates.

This task is a step in ["Process of Administering and Using Assessments" on page 212](#).

**To create an assessment template**

- 1 Navigate to the Administration - Data screen, then the Sales Assessment Templates view.
- 2 In the Assessment Templates list, create a new record, and complete the necessary fields.  
Some fields are described in the following table.

| Field        | Comments                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assessment   | Type the name of the template.                                                                                                                                                                                                                                                                                                                                                                        |
| Type         | <p>Select a value that specifies where you want the template to be available. For example, select Contact if you want to use this template to create an assessment plan for contacts.</p> <p>The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see <a href="#">Chapter 5, "Working with Lists of Values."</a></p> |
| Sales Stages | <p>If you are creating a template of type Opportunity, then select sales stages with which you want to associate the assessment template.</p> <p>When one of these sales stages (and matching sales method) is specified for an opportunity, the assessment template is used to automatically populate the Assessments view for that opportunity.</p>                                                 |
| Sales Method | Displays a value when a sales stage is selected.                                                                                                                                                                                                                                                                                                                                                      |
| Active       | Select the check box to display the template name in the list of values for the Template Name field of the template type. For example, if the Type field is Contact, then select this check box to display the template name in the list of values for the Template Name field in the Assessments view of the Contacts screen.                                                                        |

- 3 In the Assessment Attributes list, create a new record for each attribute you want to assess.  
Some fields are described in the following table.

| Field              | Comments                                                                      |
|--------------------|-------------------------------------------------------------------------------|
| Order              | Type a number for the attribute's position in the Assessment Attributes list. |
| Name               | Type the name of the attribute.                                               |
| Weight             | Type a number for the relative importance of the attribute.                   |
| Max Child          | Displays the maximum score from the Attribute Values list.                    |
| Weight Times Score | Displays the product of the Weight and the Max Child values.                  |

- 4 For each assessment attribute, create a record for each possible value of the attribute in the Attribute Values list.

Some fields are described in the following table.

| Field       | Comments                                                              |
|-------------|-----------------------------------------------------------------------|
| Order       | Type a number for the value's position in the Attribute Values list.  |
| Value       | Type the name of the value, for example, Excellent, Good, or Average. |
| Score       | Type the number of points that the value represents.                  |
| Description | Type additional information about the value to help the assessor.     |

These values appear in the Pick Attribute Value dialog box when the user applies the template. For information about using an assessment template, see [“Assessing an Opportunity” on page 374](#).

## How Assessment Scores Are Calculated

The total score for the assessment is determined by summing weighted scores for each assessment attribute as shown in the following equation:

$$\text{Total\_Score} = \sum_{i=1}^n (\text{Weight}_i)(\text{Score}_i)$$

where:  $n$  is the number of assessment attributes in the template.

The score is also calculated as a percentage of the maximum score possible as shown in the following equation:

$$\text{Max\_Total\_Score} = \sum_{i=1}^n (\text{Weight}_i)(\text{Max\_Score}_i)$$

where:  $\text{Max\_Score}_i$  is the largest score for any value in the Attribute Values list for the  $i$ th attribute. This value is the Max Child value shown in the Assessment Attributes applet. For example, the largest score for Attribute 2 is 6 and the largest score for Attribute 3 is 10 in the assessment example in the [“Scenario for Using and Administering Assessments” on page 211](#).

## Performing an Assessment (End User)

You can perform assessments of accounts, contacts, and opportunities.

You can use account assessments to compare accounts, to compare accounts with a model, or to determine the information that is present or not present for an account. You complete the assessment by selecting the appropriate values for the different accounts.

The following procedure shows how to assess an opportunity, but the procedure is essentially the same for any screen where assessments can be performed.

An opportunity assessment helps you qualify opportunities and verify resource allocation. Using an assessment template, you can select values and attributes to assign a composite value to the opportunity.

**NOTE:** In some companies, your Siebel application automatically generates assessments, but if this process has not been automated, then you can manually create assessments.

This task is a step in [“Process of Administering and Using Assessments”](#) on page 212.

### ***To perform an assessment***

- 1 Navigate to the appropriate Assessments view.

For example, to assess an opportunity, navigate to the Opportunities screen, then the Opportunities List. Drill down on the Opportunity Name field for the opportunity that you want to assess, and navigate to the Assessments view.

- 2 In the Assessments list, create a new record, and complete the necessary fields.

Alternatively, select a record from the list of assessments.

- 3 For each attribute in the Assessment Attributes list, select the appropriate value for the attribute from the drop-down list in the Value field.

A composite assessment value for the item appears as a percentage value in the Percent field in the Assessments view. This percentage compares the value you entered with the maximum possible value for the item.

## **Assessing an Opportunity for Target Account Selling (End User)**

Sales professionals can use the Assessments view to evaluate the opportunity using criteria developed by Siebel MultiChannel Services. Assessments must be completed before determining the best strategy. An assessment focuses on the following four key questions:

- 1 Is there an opportunity?
- 2 Can we compete?
- 3 Can we win?
- 4 Is it worth winning?

Sales professionals assess their organization's position and the position of their top competitors against these criteria. As the sales campaign progresses, sales professionals repeat this assessment and then compare the results to past assessments to evaluate and monitor their position at each sales stage. Use the Assessments form to rate the criteria.

This task is a step in [“Process of Administering and Using Assessments”](#) on page 212.

### ***To begin an assessment***

- 1** Navigate to the Opportunities screen, then the Opportunities List view.
- 2** Drill down on the Opportunity Name field for the opportunity that you want to assess.
- 3** Navigate to the Target Account Selling view, then the Assessments view.

The Assessments list includes all the assessments you and your sales team have performed to date. Use the Assessments list to compare opportunity assessments for your company and your competitors.

- 4** In the Assessments list, create a new record.  
In the new record, the Assessment For field defaults to Our Company for self assessments.
- 5** If you are assessing a competitor's position, then enter the competitor in the Assessment For field.

In the Assessments form, complete the assessment criteria questions.



# 18 Calendar

This chapter describes the resource and calendar access tasks performed by the administrator. It includes the following topics:

- [About Calendar Resources on page 217](#)
- [About Calendar Access on page 217](#)
- [Scenarios for Administering Calendars on page 217](#)
- [Process of Administering the Calendar on page 218](#)
- [Setting Up Resources on page 218](#)
- [Adding and Modifying Calendar Access on page 219](#)
- [Deleting Calendar Access on page 220](#)
- [Configuring the Calendar Alarm on page 221](#)
- [Configuring the Calendar on page 221](#)

## About Calendar Resources

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

## About Calendar Access

Normally employees grant each other access to their calendars. However, there are various situations when the administrator might have to add, modify, or delete calendar access for employees. For information about granting access to calendars, see *Siebel Fundamentals*.

## Scenarios for Administering Calendars

This topic describes how calendar administration might be used. You might use calendar administration differently, depending on your business model. This topic includes the following scenarios:

- [“Administering Resources” on page 218](#)
- [“Administering Calendar Access” on page 218](#)

## Administering Resources

This topic includes the following scenarios requiring resource administration:

- Before the Siebel application is rolled out to users, the administrator creates resource records. He creates resource records for all the conference rooms for the various floors and buildings of the company's sites. He also creates resource records for the audio-visual equipment that employees might want to reserve for use at their meetings. For more information, see ["Setting Up Resources" on page 218](#).
- After the Siebel application is rolled out, the company grows and more sites and conferences rooms are added. Old audio-visual equipment is discarded and new equipment is purchased. The administrator continues to maintain the list of resources, keeping it up-to-date. For more information, see ["Setting Up Resources" on page 218](#).

## Administering Calendar Access

This topic includes the following scenarios requiring calendar access administration:

- Employee A is out of the office unexpectedly. Employee B must view Employee A's calendar so that she can cancel his appointments. Employee B asks the administrator to give her access to Employee A's calendar. For more information, see ["Adding and Modifying Calendar Access" on page 219](#).
- An executive has been granted access to many of his colleagues' calendars. When the executive moves to a new division, he no longer must access the calendars of these employees. He asks the administrator to clear the list by removing his name from all employees' Calendar Access List views. (Alternatively, the executive can contact all the employees whose calendars are on his Owner drop-down list and asked each of them to remove his name from their calendar access lists.) For more information, see ["Deleting Calendar Access" on page 220](#).
- When an employee leaves the company, the administrator removes the employee's name from the Owner lists of other employees. For more information, see ["Deleting Calendar Access" on page 220](#).

# Process of Administering the Calendar

To administer the calendar, complete the following tasks:

- 1 ["Setting Up Resources" on page 218](#)
- 2 ["Adding and Modifying Calendar Access" on page 219](#)
- 3 ["Deleting Calendar Access" on page 220](#)

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

## Setting Up Resources

The following procedure describes how to administer resources for calendar activities.

This task is a step in [“Process of Administering the Calendar” on page 218](#).

### **To administer resources for calendar activities**

- 1 Navigate to the Administration - User screen, then the Resources view.
- 2 In the Resources list, create a new record, and complete the necessary fields.

**TIP:** If the Description and Site fields are not sufficient to identify the resource, then other fields can be added to the Resources list applet. For example, your company might want to add Building Number and Floor fields to help users find and identify resources. For information about creating fields and making fields visible, see *Configuring Siebel Business Applications*.

- 3 Edit and delete resource records as required.

## **Adding and Modifying Calendar Access**

You can use the following Calendar Administration views to modify calendar access:

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

This task is a step in [“Process of Administering the Calendar” on page 218](#).

### **To give Employee B access to Employee A's calendar**

- 1 Navigate to the Administration - User screen, Employees, Calendar Administration, and then Access Granted.
- 2 In the Employees list, select the employee (Employee A).
- 3 In the Calendar Administration list, create a new record or select an existing record, and complete the fields in the following table.

| Field         | Comments                                                                                                                                                                                         |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Name     | Select the name of the Employee B who wants to access Employee A's calendar.                                                                                                                     |
| Update Access | Select the check box to indicate Employee B has read and write access to Employee A's calendar.<br><br>Clear the check box to indicate Employee B has read-only access to Employee A's calendar. |

### **Viewing All Calendars to Which an Employee Has Access**

Complete the following procedure to view all the calendars to which an employee has access.

***To view all the calendars to which an employee has access***

- 1 Navigate to the Administration - User screen, Employees, Calendar Administration, and then Access Received view.
- 2 In the Employees list, select the employee.

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

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

## Deleting Calendar Access

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

This task is a step in ["Process of Administering the Calendar" on page 218](#).

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

- 1 Navigate to the Administration - User screen, Employees, Calendar Administration, and then Access Received view.
- 2 In the Employees list, select the employee.

Make sure that you select the employee whose Owner drop-down list you want to clear.

- 3 Click the cogwheel icon in the Access Received list, and select Delete All.

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

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

## Removing an Employee From All Employees' Calendar Access List Views

Complete the following procedure to remove an employee from all employees' Calendar Access List views.

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

- 1 Navigate to the Administration - User screen, Employees, Calendar Administration, and then Access Granted.
- 2 In the Employees list, select the employee.

Make sure that you select the employee that you want to remove from all employees' calendar access lists.

- 3 Click the cogwheel icon in the Access Granted list, and select Delete All.

This command deletes *all* records in the list. The calendar of the employee selected in the Employees list can no longer be accessed by *any* other employees.

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

## Configuring the Calendar Alarm

To administer Calendar alarms, review the following topics:

- [“Setting Alarm Manager Load Frequency” on page 221](#)
- [“Setting Retroactive Alarms” on page 221](#)

### Setting Alarm Manager Load Frequency

The Alarm Manager Load Frequency system preference determines how frequently the calendar alarm queries the server for alarm-enabled appointments. The default value is 60 minutes, but you might want to change this time to better suit your business needs. Querying the server less frequently results in fewer SQL calls. However, each SQL call takes longer to execute. In certain cases, this trade-off results in improved performance. (Also, if the alarm frequency is less than the session time-out set in the eapps.cfg file, then sessions never time out.) For information about how to edit system preferences, see [“Setting System Preferences” on page 40](#).

### Setting Retroactive Alarms

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

## Configuring the Calendar

Some aspects of the Calendar feature that configurators or administrators can configure include:

- [“Displaying Start and End Times for Calendar” on page 222](#)
- [“Displaying Fields, Colors, Drilldowns, and ToolTips” on page 222](#)
- [“Disabling Text Wrapping” on page 224](#)
- [“Specifying Day Summary ToolTip” on page 224](#)
- [“Showing and Hiding User Interface Components” on page 226](#)
- [“Changing User Interface Strings” on page 226](#)

- [“Changing Date Display Format” on page 228](#)
- [“Changing the First Day of the Week” on page 229](#)
- [“Overriding User Preferences” on page 230](#)
- [“Enabling and Disabling Calendar Editing” on page 230](#)
- [“Using Special Date Markers” on page 231](#)
- [“Specifying Extra Business Components” on page 232](#)
- [“Dragging-and-Dropping Records from Other Applets into the Calendar” on page 232](#)
- [“Changing Controls in the Calendar Detail View” on page 235](#)
- [“Showing or Hiding Side Applets on the Life Sciences Calendar” on page 235](#)

## Displaying Start and End Times for Calendar

Two fields determine the start and end times that appear in the calendar applet. These two fields are specified by applet user properties. [Table 58](#) shows these two fields.

Table 58. Calendar Applet User Property for Calendar Activity Start and End Times

| Applet User Property | Description                                                                                      |
|----------------------|--------------------------------------------------------------------------------------------------|
| Start Date           | The name of the field that indicates the start date and time that appear in the calendar applet. |
| End Date             | The name of the field that indicates the end date and time that appear in the calendar applet.   |

## Displaying Fields, Colors, Drilldowns, and ToolTips

Review the following topics:

- [“Displaying Fields for Calendar Records” on page 223](#)
- [“Displaying Field Color” on page 223](#)
- [“Displaying Field Drilldown” on page 223](#)
- [“Displaying Field ToolTip Text” on page 223](#)

## Displaying Fields for Calendar Records

You can configure one or more fields as display fields for calendar records. Field configuration is controlled by the Display Fields applet user property. The value of this user property is a list of comma-delimited business component fields that you want to appear for each record in the calendar. For the Activity Calendar, the default value is Description, which is the description of the activity that appears in the calendar.

**TIP:** If you want to display contents of multiple fields, then you can either configure multiple display fields, or create a calculated field that concatenates other fields, and set the concatenated field name as the value of the Display Fields user property. For example, multiple display fields are used for the calendar applet (CS CG Activity HI Calendar Applet) used by the Consumer Sector application.

## Displaying Field Color

You can configure each display field to appear in a specified color and change the color dynamically. Use the Display Field Colors applet user property to configure the colors of the display fields. For information about this user property, see [Table 60 on page 225](#).

For example, the eEvents Event Calendar Applet has a value of Name for the Display Fields user property and a value of Event Type Color for the Display Field Colors user property. In the eEvents Event business component, Event Type Color has the following calculated field value:

```
IIF ([Event Type Color1] IS NOT NULL,[Event Type Color1],[Event Type Color2])
```

- Event Type Color1 has the following calculated field value:

```
IIF ([Event Type LIC] = "Seminar", "#3366CC", IIF ([Event Type LIC] = "Restricted",  
"#FF6633", IIF ([Event Type LIC] = "Fundraiser", "#339933", IIF ([Event Type  
LIC] = "Trade Show", "#9900CC", IIF ([Event Type LIC] = "Benefit", "#7AB8F6", ""))))))
```

- Event Type Color2 has the following calculated field value:

```
IIF ([Event Type LIC] = "Auction", "#B2E5B2", IIF ([Event Type LIC] = "Conference",  
"#CC66FF", IIF ([Event Type LIC] = "Cultural", "#FF0066", IIF ([Event Type  
LIC] = "Presentation", "#9999FF", IIF ([Event Type  
LIC] = "Recreation", "#FF6633", "#CC9933")))))
```

You can create different types of events (for example, conference events and cultural events) in the Events view of the Events screen, and then navigate to the Calendar view of the Events screen to see the events in the appropriate colors in the eEvents Event Calendar Applet.

## Displaying Field Drilldown

You can specify a drilldown object for each Display Field through the Display Field Drilldown Object Names applet user property. The value of the user property is a comma-delimited list of drilldown objects defined for the applet.

## Displaying Field ToolTip Text

When you position the mouse pointer over a display field in a calendar record, ToolTip text appears. The ToolTip content is configurable through the Display Field Name.ToolTip Fields applet user property, where Display Field Name is the name of the display field.

The user property value is a list of comma-delimited business component fields. The values of these business component fields appear as the ToolTip in the display field. By default, the name of the business component field is used as the label in the ToolTip text.

Make the label for a ToolTip field translatable by creating a control in the applet with the name Tooltip Field Label:Field Name. The caption of the control is used as the label for the ToolTip field. For example, for the business component Quote, field Name, the ToolTip label for the field is defined as a control of name Tooltip Field Label:Quote.Name, and the caption of the control is the label for this field.

## Disabling Text Wrapping

Set the NoWrapDesc user property to Y to disable text wrapping in the activity description field of a calendar. Applets in which you can set this property include:

- Activity HI Calendar Applet
- Activity HI Outlook Calendar Applet
- LS Pharma Activity HI Calendar Applet

## Specifying Day Summary ToolTip

For a day on the Weekly and Monthly Calendar, you can specify the format of the ToolTip that displays all the records for the day.

### Day Summary ToolTip User Properties

Table 59 lists the applet user property for the Day Summary ToolTip.

Table 59. Calendar Applet User Property for Day Summary ToolTip

| Applet User Property                          | Description                                                                                                                                                                                                                            |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ["Buscomp Name"].Day Summary Tooltip Template | A template for the day summary ToolTip.<br><br>ToolTip appears when you position the mouse pointer over the tile header (7 day weekly or monthly) or the day slot (5 day weekly).                                                      |
| Action.Day Summary Tooltip Template           | [Planned] – [Planned Completion] [Type]: [Description]<br><br>It is rendered as follows:<br><br>12:00PM – 1:00PM Appointment: Test eBiz<br><br>1:00PM – 2:00PM Training: Take course<br><br>2:00PM – 4:00PM Appointment: Design review |



## User Properties for Calendar Fields, Colors, Drilldowns, and ToolTips

Table 60 lists the Calendar user properties for the Calendar fields, colors, drilldowns, and ToolTips.

Table 60. Calendar Applet User Property for Calendar Fields, Colors, Drilldowns, and ToolTips

| Applet User Property                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Fields                        | <p>A list of comma-delimited business component fields that you want to appear for each record in the calendar.</p> <p>For the Activity Calendar, the default value is Description, which is the description of the activity that appears in the calendar.</p>                                                                                                                                                                                                                                                                     |
| Display Field Colors                  | <p>Comma-delimited color strings or field names in the format of #RRGGBB.</p> <p>If the value is a color string, and the format is #RRGGBB, then it is interpreted as a color string. If the format is not #RRGGBB, then it is interpreted as a field name.</p>                                                                                                                                                                                                                                                                    |
| Display Field Drilldown Object Names  | <p>Comma-delimited drilldown object names.</p> <p>For example, the Quote. Display Field Drilldown Object Name Applet User Property Name can drilldown to the Quote Detail - Id, Quote Detail - Name User Property Value.</p>                                                                                                                                                                                                                                                                                                       |
| Display Field Drilldown Source Fields | Comma-delimited business component field names.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| ["Display Field Name".]Tooltip Fields | <p>A list of comma-delimited field names. Replace ["Display Field Name".] with the actual display field name.</p> <p>ToolTip appears when you position the mouse pointer over the record's display field.</p> <p>For example, the Description.ToolTip Fields user property has the value of Type, Description, Planned, Planned Completion.</p> <p>The following is an example of the ToolTip that might appear:</p> <p>Type: Appointment</p> <p>Description: Test</p> <p>Start: 2/2/2004 12:30PM</p> <p>End: 2/2/2004 13:00PM</p> |

## Showing and Hiding User Interface Components

Table 61 shows how to set user properties to show or hide the UI components. The HI Calendar Base Applet contains the default values for user properties for calendars. These user properties can be overwritten by the current applet.

Table 61. Calendar Applet User Properties for User Interface Components

| Property               | Description                                                                              |
|------------------------|------------------------------------------------------------------------------------------|
| Enable Daily           | Set the Daily button to N to hide the button, and set to Y to show the button.           |
| Enable Weekly          | Set the Weekly button to N to hide the button, and set to Y to show the button.          |
| Enable Monthly         | Set the Monthly button to N to hide the button, and set to Y to show the button.         |
| Enable New Button      | Set the New button to N to hide the button, and set to Y to show the button.             |
| Enable Today Button    | Set the Today button to N to hide the button, and set to Y to show the button.           |
| Enable Print Button    | Set the Print button to N to hide the button, and set to Y to show the button.           |
| Enable Date Picker     | Set the Date Picker button to N to hide the button, and set to Y to show the button.     |
| Enable Owner Picker    | Set the Owner Picker button to N to hide the button, and set to Y to show the button.    |
| Enable Timezone Picker | Set the Timezone Picker button to N to hide the button, and set to Y to show the button. |

## Changing User Interface Strings

By changing the user interface strings, which come from Siebel Tools configurations, you can change the user interface controls. This topic applies only to the HI Calendar Base Applet, and not to calendar applets that you configure to display records from extra business components. For more information, see [“Specifying Extra Business Components” on page 232](#).

The HI Calendar Base Applet contains the basic UI strings for calendars and the repeating pop-up dialog. These UI controls can be overwritten by the current applet. [Table 62](#) lists the applet controls.

Table 62. HI Calendar Base Applet Controls

| Control Name                           | Caption                                        |
|----------------------------------------|------------------------------------------------|
| Daily Tab                              | Daily                                          |
| Weekly Tab                             | Weekly                                         |
| Monthly Tab                            | Monthly                                        |
| New Button                             | New                                            |
| Today Button                           | Today                                          |
| Print Button                           | Print                                          |
| Delete Button                          | Delete                                         |
| 5 Day Week Button                      | 5 Day Week                                     |
| 7 Day Week Button                      | 7 Day Week                                     |
| New Account Call Button                | New Account Call                               |
| New Contact Call Button                | New Contact Call                               |
| New Meeting Button                     | New Meeting                                    |
| Owner Label                            | Owner                                          |
| Timezone Label                         | Time Zone                                      |
| Private Label                          | (private)                                      |
| No Description Label                   | (no description)                               |
| All Employee View Label                | All Employees                                  |
| Time Slot Label Tooltip                | Click to create a new record                   |
| Tile Header Day Label Tooltip          | Click to navigate to this day                  |
| Tooltip Field Label:Description        | Description                                    |
| Tooltip Field Label:Meeting Location   | Meeting Location                               |
| Tooltip Field Label:Comment            | Comment:                                       |
| Tooltip Field Label:Planned            | Planned                                        |
| Tooltip Field Label:Planned Completion | Planned Completion                             |
| Tooltip Field Label:Type               | Type                                           |
| Repeating Dialog Title                 | Edit Repeating Activities                      |
| Repeating Dialog Label 1               | This appointment is part of a repeating series |

Table 62. HI Calendar Base Applet Controls

| Control Name                          | Caption                              |
|---------------------------------------|--------------------------------------|
| Repeating Dialog Label 2              | Please choose one of the following:  |
| Repeating Dialog This Instance        | Modify this instance                 |
| Repeating Dialog All Future Instances | Modify this and all future instances |
| Repeating Dialog OK Button            | OK                                   |
| Repeating Dialog Cancel Button        | Cancel                               |

## Changing Date Display Format

Table 63 shows the LOVs used to change the display format for the days of the week, the days of the month, the print header for different views, and the 5 Day Weekly header.

Table 63. Date Display LOVs

| To change...                     | Use...                                                                   |
|----------------------------------|--------------------------------------------------------------------------|
| Labels for the days of the week. | LOV type IDS_SSA_LOVTYPE_DAY_NAME with names from Monday to Sunday.      |
| Labels for the months.           | LOV type IDS_SSA_LOVTYPE_MONTH_NAME with names from January to December. |

Table 63. Date Display LOVs

| To change...                                     | Use...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Formats of the print header for different views. | LOV type CAL_PRINTHEADER_FORMAT with the following names: Daily, Weekly, Monthly, WeeklyFromTo.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Format of other date displays.                   | LOV type CAL_DATEDISPLAY_FORMAT with the following names: <ul style="list-style-type: none"> <li>■ Daily. Controls the format of the date string that appears on the button row in the Daily calendar.</li> <li>■ Weekly. Controls the format of the date string that appears on the button row in the Weekly calendar.</li> <li>■ Monthly. Controls the format of the date string that appears on the button row in the Monthly calendar.</li> <li>■ WeeklyFromTo. Controls the from and to format for the Weekly calendar.</li> <li>■ HI - 5 Day Weekly Header. Controls the date format in 5 day weekly calendar header.</li> <li>■ SI - Weekly Header. Controls the date format in weekly calendar header for SI calendars.</li> </ul> |

## Changing the First Day of the Week

Use the First Day of Week applet user property to change the first day of the week. [Table 64](#) shows the values for the First Day of the Week applet user property.

Table 64. First Day of Week Applet User Property

| Use this value... | For....   |
|-------------------|-----------|
| 0                 | Sunday    |
| 1                 | Monday    |
| 2                 | Tuesday   |
| 3                 | Wednesday |
| 4                 | Thursday  |
| 5                 | Friday    |
| 6                 | Saturday  |

## Overriding User Preferences

You can use the applet user property to override all the user interface user preferences, which are used for calendars. [Table 65](#) shows the applet user property.

Table 65. Applet User Property

| User Property Name                | Description                                                                    |
|-----------------------------------|--------------------------------------------------------------------------------|
| Default Calendar Mode             | Language independent calendar mode (Daily, Weekly, or Monthly).                |
| Preferred Weekly Mode             | Weekly mode (5 Day Weekly for a 5 day week, or 7 Day Weekly for a 7 day week). |
| Preferred Timeslot Interval       | Timeslot interval in slot views.                                               |
| Preferred Business Day Start Time | Start time of a business day.                                                  |
| Preferred Business Day End Time   | End time of a business day.                                                    |
| Preferred Appointment Duration    | Appointment duration when creating new appointments.                           |

## Enabling and Disabling Calendar Editing

The following list shows the consequences if the No Insert property or the No Update property is selected, or if the Calendar is based on multiple business components.

- If the No Insert property of the calendar applet is checked, then the icon to create new activities is disabled, and inline record creation is disabled. Inline record editing is allowed.
- If the No Update property of the calendar applet is checked, then inline editing is disabled. Inline record creation is still allowed.
- If the Calendar is based on multiple business components, then the icon to create new activities is disabled, inline record creation is disabled, and inline record editing is disabled. For details, see [“Specifying Extra Business Components” on page 232](#).

## Using Special Date Markers

You can use markers that can appear in 7-Day Weekly and Monthly calendars to mark certain days as special days. These markers are configured through the applet user property. [Table 66](#) shows the user properties.

Table 66. Special Date Markers

| User Property Name                    | Description                                                                                                                                                                    |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Special Date Buscomp Name             | The name of the business component to get special date info from.                                                                                                              |
| Special Date Buscomp Start Date Field | The start date field.                                                                                                                                                          |
| Special Date Buscomp End Date Field   | The end date field.                                                                                                                                                            |
| Special Date Buscomp Marker Field     | A field that is used to generate the special date marker.<br><br>By default, it is a piece of HTML that is inserted into an <A> element and put in the header of the day tile. |
| Special Date Marker ToolTip           | A comma-delimited list of field names.                                                                                                                                         |

## Specifying Extra Business Components

You can configure a calendar applet to display records from multiple business components by specifying additional source business components using the Extra Source Buscomp Names applet user property. Table 67 describes this applet user property. For each extra source business component, you can specify properties such as its Start Date Field using the [Buscomp Name.] notation. For example, to display both activities and quotes in a single calendar, you can configure the applet using the Action business component and then specify Quote as the extra source business component. Use the Quote.Start Date Field user property to specify the Start Date Field for Quote business component.

Table 67. Calendar Applet User Property to Display Data from Multiple Business Components

| Applet User Property       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Extra Source Buscomp Names | <p>The extra business components. You can specify user properties for each extra source business component using the [Buscomp Name]. notation.</p> <p>For example, to specify the Start Date Field for Quote business component, you use Quote.Start Date Field user property. For each extra source business component, Start Date Field user property is required.</p> <p>There are two user properties that are specifically for extra source business components.</p> <ul style="list-style-type: none"> <li>■ Visibility Mode</li> <li>■ Search Specification</li> </ul> <p>For example, to specify the visibility mode and search specification for Quote business component, you use Quote.Visibility Mode and Quote.Search Specification user properties.</p> |

## Dragging-and-Dropping Records from Other Applets into the Calendar

A list applet in the Calendar view can be configured so that one or more records can be dragged from the list applet and dropped onto the calendar applet.



## Drag-and-Drop Action Behavior

The behavior of the drag-and-drop action is configurable. [Table 68](#) shows an example of this behavior.

Table 68. Example of Configurable Drag-and-Drop Behavior

| In the...                   | Dragging...                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pharma application          | A record from the Activities list to the daily calendar applet updates the Planned Start date for the activity according to where it is dropped on the calendar.                                                                                                                                                                                |
| Consumer Sector application | Records from the Activities list to the calendar applet creates a new record of type In Store Visit for the account, and associates appropriate activity records to the new In Store Visit record.<br><br>If multiple records are dragged, then the account for the new record is based on the account of the last record in the dragged group. |

## Drag-and-Drop User Properties

■ [Table 69](#) shows the user properties set on the list applet that determine the drag-and-drop behavior.

Table 69. Applet User Property for Calendar Drag-and-Drop

| Applet User Property      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable Drag And Drop      | Set this user property to Y or N. The default is N.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Calendar Default Action   | Set this user property to: <ul style="list-style-type: none"> <li>■ NewRecord to create a new calendar activity record when a record is dragged from the list applet to the calendar applet. (This behavior is also the default behavior, unless the Calendar Drag Method user property is set.)</li> <li>■ UpdateTime to change the time field in the source (dragged) record according where the record is dropped in the calendar applet. (No new record is created.) This behavior is seen in the Pharma application.</li> </ul> |
| Calendar UpdateTime Field | If Calendar Default Action is UpdateTime, then set this user property to the time field in the source applet that you want to have updated by the drag-and-drop action.<br><br>For example, in the Pharma application (Pharma Calendar Activity List Applet), this user property is set to Planned.                                                                                                                                                                                                                                  |

Table 69. Applet User Property for Calendar Drag-and-Drop

| Applet User Property                                                                                                          | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Calendar Drag Field,<br>Calendar Drag Field1,<br>Calendar Drag Field2,<br>Calendar Drag Field3<br>...<br>Calendar Drag Fieldn | <p>If Calendar Default Action is NewRecord, then set these user properties to copy data from the source record to the new calendar activity (target) record.</p> <p>The format for these user properties follows:<br/><i>Source_field_name,Target_field_name</i></p> <p>For example, to copy content from a field named Summary in the source record to the Description field in the calendar activity record, the Calendar Drag Field is Summary,Description.</p>                                                                                                                                                                                                                                                                |
| Calendar Drag Associate                                                                                                       | If Calendar Default Action is NewRecord, then set this user property to Y if you want to have the source records associated with the new (target) record. The dragged records become child records of the new calendar activity record.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Calendar Drag Child Associate Field                                                                                           | If Calendar Drag Associate is Y, then set this user property to the name of the field in the dragged (source) records that is to associate them with the new calendar activity record. The field specified gets populated with the row ID of the new calendar activity record.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Calendar Drag Method                                                                                                          | <p>If the default calendar action does not meet your needs, then set this user property to your own method name to control the drag-and-drop action.</p> <p>If this user property is set, then the preceding user properties are ignored.</p> <p>For example, in the Consumer Sector application, this user property is set to the Drag And Drop Handler method.</p>                                                                                                                                                                                                                                                                                                                                                              |
| Calendar Drag BusComp                                                                                                         | <p>If a method is supplied in the Calendar Drag Method user property, then set this user property to the name of the business component on which you want to invoke the method. If this user property is not specified, then the method is invoked on the current business component.</p> <p>For example, in the Consumer Sector application, this user property is set to the In Store Visit business component.</p>                                                                                                                                                                                                                                                                                                             |
| Calendar Drag BusObj                                                                                                          | <p>If a business component is supplied in the Calendar Drag BusComp user property, then set this user property to the name of the business object to use when retrieving the Calendar Drag BusComp business component.</p> <p>If this user property is not specified, then the current business object is used. However, it is better to specify a value for this business object, even if it is the same as the current business object. This setting makes sure that instantiating the Calendar Drag BusComp business component does not affect other business components within the current view.</p> <p>For example, in the Consumer Sector application, this user property is set to the In Store Visit business object.</p> |

## Changing Controls in the Calendar Detail View

The Calendar Detail view (accessed by creating a new record in the daily, weekly, or monthly calendar views) has three buttons that are managed by the specialized class `CSSSWFrameGanttCalOUI` in the GanttChart OUI Applet (the scheduling control applet). [Table 70](#) shows the button name and the pop-up applet invoked by the button.

Table 70. Participant Availability Buttons

| Button Name  | Popup Applet Invoked                |
|--------------|-------------------------------------|
| Add Employee | HI Gantt Chart Employee Pick Applet |
| Add Resource | HI Gantt Chart Resource Pick Applet |
| Add Contact  | HI Gantt Chart Contact Pick Applet  |

## Showing or Hiding Side Applets on the Life Sciences Calendar

The calendar pages for the Siebel Life Sciences application have list applets on the right side of the calendar applet. The Suppress Side Applets Calendar Types user property on the LS Pharma Activity HI Calendar Applet determines whether or not the side list applet appears. For example, you can choose to have the side list applet appear with the daily and weekly calendars but not with the monthly calendar.

### ***To hide or show the side list applet on the LS Pharma HI Activity Calendar View***

- For the LS Pharma Activity HI Calendar Applet, edit the Suppress Side Applets Calendar Types applet user property to include the calendars for which you want to hide the list applet.

For example, set the value to Daily, Weekly5, Weekly7, Monthly to hide the side list applet on all the calendars.



# 19 State Models

This chapter is about how state models work and how to set up state models. It includes the following topics:

- [About State Models on page 237](#)
- [Scenario for Managing State Models on page 238](#)
- [Process of Setting Up State Models on page 239](#)
- [Configuring Business Components for State Models on page 239](#)
- [Creating State Models and State Transitions on page 240](#)
- [Activating State Models on page 242](#)
- [Configuring All Operations for Child Records on page 243](#)
- [About Criteria for State Transitions on page 244](#)

## About State Models

State model functionality allows administrators to control the value of a field in a record by setting up for that field the allowed state values and the allowed transitions between those state values. For example, administrators can limit the Status field for a service request record to the following state values: Open, Closed, and Pending. Furthermore, administrators can limit the allowed transitions between those state values to the following transitions: Open to Pending, Open to Closed, and Pending to Closed.

For Siebel workflows, state models provide a data-driven method for extending control using state values for fields in records. For general information about Siebel workflows, see *Siebel Business Process Framework: Workflow Guide*.

The state model functionality consists of the following key elements:

- **State Model.** The state model is a blueprint of allowed state values and allowed transitions between those state values.
- **State Machine.** The state machine enforces the transitions between state values. The state value can designate the status of a record. The state value for a field in a record can also determine if the other field values in that record can be modified. For example, a record with a Status field value of Closed might be read-only, and the other field values in the record cannot be modified. The state machine reviews all criteria that administrators define for the transition of a state value before allowing that transition.

- **State Transitions.** State transitions define the allowed changes from one value to another value for a field in a record. For example, a record with a Status field value of Closed must be reopened. The Status field can transition from the Closed value to an Open value and from the Open value to a Pending value, but cannot transition directly from the Closed value to a Pending value.

Administrators can set up criteria for state transitions. For example, they can specify that only certain users can initiate state transitions or that all users can initiate state transitions only if certain criteria are met.

## Scenario for Managing State Models

This topic gives one example of how state model management might be used. You might use state model management differently, depending on your business model.

A company wants to configure its Siebel application to track suggestions from customers and employees about product enhancements. To implement this configuration, a developer creates a new Enhancements business component and a supporting Product Enhancements screen with views.

The administrator must set up a state model for this new business component. She uses Siebel Tools to check that the Enhancements business component is based on the CSSBCBase class. She discovers that the configurator already enabled the state model user property for this business component.

In the Siebel application, she creates a state model for the Status field (an LOV field) of the Enhancement business component. This state model contains the following allowed state values:

- **New.** She designates this state value as the default state value. When an enhancement idea is first received, the state value for the Status field of the record is always New.
- **Assigned.** She sets up this state value.
- **Accepted.** When she sets up this state value, she selects the check box for the No Delete field and the No Update field so that an accepted enhancement record is read-only and cannot be deleted or modified.
- **Rejected.** When she sets up this state value, she selects the check box for the No Delete field and the No Update field so that a rejected enhancement record is read-only and cannot be deleted or modified.

This state model contains the following allowed transitions between the state values:

- **From New to Assigned.** Managers assign enhancement suggestions to the most suitable employees for investigation. Therefore, she specifies that only managers can change the Status field value from New to Assigned.
- **From Assigned to Accepted.** Employees must write an assessment of each enhancement suggestion before accepting it. Therefore, she creates simple criteria indicating that users cannot change the Status field value for a record to Accepted if the Assessment field for the record is blank.
- **From Assigned to Rejected.** Employees must write an assessment of each enhancement suggestion before rejecting it. Therefore, she creates simple criteria indicating that users cannot change the Status field value for a record to Rejected if the Assessment field for the record is blank.

Finally, she activates the state model by restarting the server.

## Process of Setting Up State Models

To set up state models, complete the following tasks:

- 1 [“Configuring Business Components for State Models” on page 239](#)

This task is required only if the business component is not enabled for state models.

- 2 [“Creating State Models and State Transitions” on page 240](#)

- 3 [“Activating State Models” on page 242](#)

## Configuring Business Components for State Models

Administrators can create state models for business components that meet the following criteria:

- The business components are state-model enabled in the preconfigured Siebel application.
- The business components are based directly on the CSSBCBase class and are enabled using the procedure in this topic.

Oracle supports state model creation for business components that are based on the CSSBCBase class and its subclasses. Do not create or modify state models for the Enterprise Service Definitions, SRM Request, and SRM Repeating Request business components. These business components are used for server administration.

This task is a step in [“Process of Setting Up State Models” on page 239](#).

### Determining Whether Business Components Are Enabled for State Models

Complete the following procedure to determine whether a business component is enabled for state models.

#### *To determine whether a business component is enabled for state models*

- 1 Navigate to the Administration - Application screen, then the State Models view.
- 2 Create a new record, and click the select button in the Business Component field.
  - If the business component is listed in the Business Components dialog box, then the business component is enabled. You can create a state model for the business component. For more information, see [“Creating State Models and State Transitions” on page 240](#).
  - If the business component is not listed in the Business Components dialog box, then the business component is not enabled. You can enable the business component. For more information, see the other procedure in this topic.

- 3 Delete or undo the new record.

## Enabling Business Components for State Model Functionality

In Siebel Tools, administrators can enable a business component for state model functionality.

### *To enable a business component for state model functionality in Siebel Tools*

- 1 Make sure that the business component is based on the CSSBCBase class.
- 2 Create a new business component user property with the following properties:
  - For the Name column, enter a value of State Model.
  - For the Value column, enter a value of Y.

# Creating State Models and State Transitions

This topic describes how to create state models and state transitions for those models.

To create a state model for a field on a business component, the field must meet the following criteria:

- The field is an LOV (list-of-values) field or MLOV (multilingual-list-of-values) field.
- The field has no dependencies on other fields.

For example, do not use a constrained LOV field or a calculated field.

This task is a step in [“Process of Setting Up State Models” on page 239](#).

### *To create a new state model*

- 1 Navigate to the Administration - Application screen, then the State Models view.
- 2 In the State Models list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field              | Comments                                                                                                                                                                                                                                                                                   |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name               | Type a name that uniquely identifies the state model.                                                                                                                                                                                                                                      |
| Business Component | Select the business component for the state model. The dialog box for this field displays all of the business components that are enabled for state models. To enable additional business components, see <a href="#">“Configuring Business Components for State Models” on page 239</a> . |
| Field              | Select the name of the field for the state model. The dialog box for this field displays the fields that are defined for the business component.                                                                                                                                           |



| Field      | Comments                                                                                                                                                                                                        |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activation | Select the date on which the state model is enforced.<br><br><b>NOTE:</b> You can set up multiple state models for a field as long as the activation to expiration periods for each state model do not overlap. |
| Expiration | Select the date on which the state model is no longer enforced.                                                                                                                                                 |

- 3 Navigate to the States view, in the States list create a new record for each state value for the field in the state model, and complete the necessary fields.

Some fields are described in the following table.

| Field               | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| State Name          | Select the state value for the field in the state model.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Default             | Select this check box to indicate that the State Name field is the default state value. The default state value specifies the value that is automatically populated in the state model field when a new record is created.<br><br><b>NOTE:</b> If the field in the state model is populated from Siebel Tools, then you cannot override this default in the state model.                                                                                                                                                                     |
| No Delete           | Select this check box to indicate that a record with a field in this state is read-only and cannot be deleted.                                                                                                                                                                                                                                                                                                                                                                                                                               |
| No Update           | Select this check box to indicate that a record with a field in this state is read-only and cannot be modified.<br><br><b>NOTE:</b> If you select the No Delete and No Update fields for a state in the state model, then a record with MVG (multi-value group) fields that do not have a direct parent-child link between the parent field and the MVG applet is not read-only when the state for the record has the No Update or No Delete fields selected. To avoid confusion for users, you can remove MVG fields from the child applet. |
| Restrict Transition | Select this check box to indicate that only the transitions that you define for the state value are allowed. If you select this check box and do not define transitions, then the state value is an end state, and the state value cannot change to another state value.<br><br>Clear this check box to indicate that the state value can transition to any other defined state value.                                                                                                                                                       |

- 4 Navigate to the Transitions view, and complete the following steps:

- a** In the Transitions list, create a new record for each state transition that you want to restrict, and complete the necessary fields.

Some fields are described in the following table.

| Field           | Comments                                                                                                                                                                                                                                                                                                                                 |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| From State      | Select a source state value in the state transition of the state model field.<br><br><b>NOTE:</b> If you do not define a state transition for the State Name field that is the default value, then the field in the state model cannot change.                                                                                           |
| To State        | Select a destination state value in the state transition of the state model field.                                                                                                                                                                                                                                                       |
| Public          | Select this check box to indicate that all users are allowed to perform this state transition. If you select this check box, then the records in the Authorized Positions list are not in effect. For more information, see <a href="#">Step b</a> .                                                                                     |
| Rule Field      | Select a field that controls the state transition. This field is frequently not the field in the state model, but another field in the business component for the state model.                                                                                                                                                           |
| Rule Operator   | Select an operator for the field in the Rule Field.                                                                                                                                                                                                                                                                                      |
| Rule Value      | Type the state value for the field in the Rule Field.<br><br>The Rule Field, Rule Operator, and Rule Value fields allow you to specify simple criteria that must be met for the state transition to occur. For more information about creating simple criteria, see <a href="#">"About Criteria for State Transitions" on page 244</a> . |
| Rule Expression | Type complex criteria that must be met for the state transition to occur.<br><br>Users see an error message when they attempt to perform a state transition, and the transition does not satisfy the rule expression.                                                                                                                    |

- b** To restrict a state transition to a group of users (or positions), create records in the Authorized Positions list, and clear the check box in the Public field for the transition record.

**NOTE:** If the check box in the Public field is cleared, and if you do not create positions in the Authorized Positions list, then no users are allowed to perform the state transition.

## Activating State Models

This topic provides information about activating state models.

### How Are State Models Activated?

A new state model is not available to users until you start a new Siebel Application Object Manager server process. By restarting the server or the AOM server components, you start new AOM processes that obtain the new state model from the refreshed state model cache.

## How Are State Models Activated for Mobile Users?

For mobile users who connect through Siebel Remote, the state model is available after a user synchronizes with the database server. State models are supported on regional nodes. For more information about support for regional nodes, see *Siebel Remote and Replication Manager Administration Guide*.

## How Are State Models Enforced?

State models are enforced on the Siebel business logic level. Thus, state models are enforced for updates that you make through Siebel Visual Basic, Siebel eScript, and workflow processes. However, state models are not enforced for updates that do not go through Siebel Application Object Managers, such as updates that you make through Enterprise Integration Manager (EIM) or workflow policy programs.

## How the AOM Reads State Model Objects

The AOM reads state model objects from the run-time database, not from the compiled Siebel repository file (SRF).

**NOTE:** If you distribute state models to other environments, then migrate the run-time database tables for the state model (and distribute the SRF file).

This task is a step in [“Process of Setting Up State Models” on page 239](#).

### To activate state models

- 1 Perform one of the following actions:
  - Restart the server.
  - Restart the AOM server components.
- 2 Clear the browser cache.

# Configuring All Operations for Child Records

By default, users cannot delete child records when the No Delete field is selected for the state value of the parent record. Also, by default, users cannot add and modify child records when the No Update field is selected for the state value of the parent record.

## Enabling All Operations for Child Records

To override the default behavior, administrators can complete the following procedure to enable all operations for child records.

### **To enable all operations for child records**

- In Siebel Tools, set the Enable Child Modification user property for the State Model Cache business service to Y.

Users can now delete child records, even when the No Delete field is selected for the state value of parent record. Also, users can now add and modify child records, even when the No Update field is selected for the state value of parent record.

## **Disabling All Operations for Specific Child Records**

After they enable all operations for child records, administrators can complete the following procedure to disable all operations for specific child records.

### **To disable all operations for specific child records**

- In Siebel Tools, set the State Model Enable Child Modification user property for the business component associated with specific child records to N.

The default behavior applies to the child records associated with the business component.

## **Enabling All Operations for Specific Child Records**

To override the default behavior, administrators can complete the following procedure to enable all operations for specific child records.

### **To enable all operations for specific child records**

- 1 In Siebel Tools, make sure the Enable Child Modification user property for the State Model Cache business service is set to N (the default value).

**NOTE:** When you change this user property from Y to N, you disable all operations for child records for which you do not complete [Step 2](#) of this procedure.

- 2 Set the State Model Enable Child Modification user property for the business component associated with specific child records to Y.

Users can now delete child records associated with the business component, even when the No Delete field is selected for the state value of parent record. Also, users can now add and modify child records associated with the business component, even when the No Update field is selected for the state value of parent record.

# **About Criteria for State Transitions**

Administrators can define the criteria that must be met for a state transition to occur. This topic includes an example of these criteria. The syntax for these criteria is the same as the syntax for calculated field values and for field validation in Siebel Tools. For more information about the syntax, see the information about operators, expressions, and conditions in *Siebel Developer's Reference*.

## Example of Simple Criteria

Administrators can specify simple criteria in the Rule Field, Rule Operator, and Rule Value fields in the Transitions view in the State Model view of the Administration - Application screen.

For example, an administrator can create a state transition record to allow users to change the Status field of a service request from an Open value to a Closed value only when the value in the Sub-Status field of the service request is Resolved. [Table 71](#) shows the values that the administrator enters in the fields of the state transition record.

Table 71. Field Values of State Transition Record Containing Simple Criteria

| Field         | Value      |
|---------------|------------|
| From State    | Open       |
| To State      | Closed     |
| Rule Field    | Sub-Status |
| Rule Operator | =          |
| Rule Value    | 'Resolved' |



# 20 Literature

This chapter is about administering and using literature in the Siebel application. It includes the following topics:

- [About Literature on page 247](#)
- [About Setting Up Literature Files on page 248](#)
- [Creating and Modifying Literature Files on page 248](#)
- [Creating Literature Records on page 249](#)
- [Creating Translation Records on page 252](#)
- [Creating Literature Item Kits on page 252](#)
- [About Making Literature Visible to Users on page 254](#)
- [Sharing Literature Through the Products Screen on page 254](#)
- [Sharing Literature Through the Competitors Screen on page 255](#)
- [Sharing Literature Through the Decision Issues Screen on page 256](#)
- [Sharing Literature Through the Correspondence Screen on page 256](#)
- [Sharing Literature Through eBriefings on page 256](#)
- [Sharing Literature Through Literature or Infocenter on page 257](#)

## About Literature

Siebel Literature allows you to give your users access to sales and marketing literature, such as product brochures, white papers, data sheets, and other types of literature items. Users view these documents using the application that created them, for example, Microsoft Word, Lotus Word Pro, or Adobe Acrobat.

Literature items can also be grouped into literature kits. Literature kits can include items not normally thought of as literature, such as promotional hats, coffee mugs, or T-Shirts. These kits can then be made available for distribution through fulfillment centers. Literature kits are covered later in this chapter. For information about fulfillment, see *Siebel Correspondence, Proposals, and Presentations Guide*.

After you create literature records and associate documents with them, your employees can use literature in the following ways:

- Employees can use the Literature or Infocenter screen to search through all the literature that is available to them.

- You can associate literature with business objects such as products or decision issues. Then users can display the literature when they are looking at the record for the associated business object. For example, the user can navigate to the Product screen, select a product, and navigate to the Product Literature view to find all literature items associated with that product.
- When your employees use the Correspondence screen to create correspondence, they can include literature as enclosures. The user or fulfillment center can print this literature document, or it can use preprinted copies of literature such as glossy brochures. It can also enclose promotional items that are parts of literature kits.
- Employees can track literature associated with products, industries, accounts and competitors so that they appear on your Briefing pages.

## About Setting Up Literature Files

To set up a literature file, you must

- Create the document in another program.
- Create a Literature record that includes the document in your Siebel application.

**NOTE:** You might want to create a literature record without associating a document with it. For example, if the record represents an item such as a hat or cup, which is part of a literature kit, then you probably do not associate a document with it.

## Creating and Modifying Literature Files

Literature files can be created or saved using many kinds of software. The following file types are among the most common:

- Adobe Acrobat (PDF)
- Excel (XLS)
- Word (DOC)
- PowerPoint (PPT)
- Bitmap (BMP)
- JPEG (JPG)

### *To create a new literature file*

- 1 Create a literature file in the appropriate software application.
- 2 Save the file on your hard drive.

### Modifying an Existing Literature File

Complete the following procedure to modify an existing literature file.



***To modify an existing literature file***

- 1** Navigate to the Administration - Document screen, then the Literature view.
- 2** Select the literature file that you want to modify.  
Information about the file appears in the More Info form. You can use this form to change existing comments or characteristics; for example, Distribution Method.
- 3** Drill down on the File Name field for the literature file that you want to modify.  
The actual literature file opens in the type of tool that was used to create it; for example, Word.
- 4** Modify the file, and save it locally.
- 5** Upload the modified file to the existing Literature record.

## Creating Literature Records

After you have created a literature file, you must create a literature record in the Siebel database to make the file available to users.

***To create a literature record***

- 1** Navigate to the Administration - Document screen, then the Literature view.
- 2** In the Literature list, create a new record, and attach the literature file.  
The new file is added to the available literature. Appropriate information appears in the Literature list and the More Info form.
- 3** Enter the rest of the information required for the new record in the Literature list and the More Info form of the new record.

Some fields are described in the following table.

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name            | Type a name for the literature record.                                                                                                                                                                                                                                                                                                                                         |
| Description     | Type a description of the document. Because literature items can be in any language, you might want to indicate the language of the item in this field (or in the Name field).                                                                                                                                                                                                 |
| Literature Type | <p>Select the type of the literature. You can create new literature types in the List of Values view of the Administration - Data screen.</p> <p>Because the Literature Type field is used to filter literature items in various applets (by setting the Search Specification property for the applet in Siebel Tools), be careful when editing the Literature Type field.</p> |

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Size            | Displays the size of the literature file. The size of the file that you select determines the information that appears. There is no restriction for file size except from your network and memory availability.                                                                                                                                                                                                                                                                                                                                                                                                           |
| File Type       | Displays the file type of the literature file, for example DOC or PDF. The type of the file that you select determines the information that appears.                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Modified        | Displays the date that the literature file was last modified.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Update File     | Select the check box to indicate that users' copies of the literature are automatically updated each time the original file is updated.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| File Name       | Select the document file. You can also manually enter the file name.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Synopsis        | Type a synopsis of the document's content.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Release Date    | Select the date when the document first appears in My Briefing. For more information about eBriefings, see <i>Siebel Briefings Administration Guide</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Expiration Date | Select the date when the document no longer appears in My Briefing. For more information about eBriefings, see <i>Siebel Briefings Administration Guide</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Author          | Select the document's author.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Accounts        | Select the accounts with which the literature is associated. The literature appears in the Account Briefing if the account is tracked by the user. For more information, see <i>Siebel Briefings Administration Guide</i> .                                                                                                                                                                                                                                                                                                                                                                                               |
| Competitors     | <p>Select the competitors with which the literature is associated. Use this field to allow the user to display the literature using the Competitors screen.</p> <p>If you also select the Internal field, then the literature appears in the Comparative Literature view of the Competitors screen. If you do not select the Internal field, then the literature appears in the Competitor's Literature view of the Competitors screen.</p> <p>The literature also appears in a Competitor Briefing if the competitor is tracked by the user. For more information, see <i>Siebel Briefings Administration Guide</i>.</p> |

| Field               | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Internal            | <p>Select the check box to indicate the document is internally sensitive and not intended for public distribution.</p> <p>If Internal is selected, then the literature is not available as an enclosure in the Correspondence screen, and it appears in the Comparative Literature list of the Competitors screen.</p> <p>If Internal is not selected, then the literature is available as an enclosure in the Correspondence screen, and it appears in the Competitive Literature list of the Competitors screen.</p>               |
| Local               | Select the check box to indicate the document is available on the local file application for users of the Remote Client. If a document is not available locally, then the user can request it by selecting the Request field.                                                                                                                                                                                                                                                                                                        |
| Request             | Select the check box to indicate the literature is downloaded during each synchronization session for users of the Remote Client.                                                                                                                                                                                                                                                                                                                                                                                                    |
| Distribution Method | <p>Select a value to specify whether or not the file is automatically downloaded to users of the Remote Client.</p> <p><b>Publish.</b> During each synchronization session, if your user does nothing, then the file is automatically downloaded. If your user explicitly skips the file, then the file is not downloaded in that synchronization session.</p> <p><b>By Request.</b> During synchronization, the user receives the record, but not the actual file. To receive the file, the user must select the Request field.</p> |
| Industries          | Select the industries associated with the literature. The literature appears in My Briefing if the user tracks the industry.                                                                                                                                                                                                                                                                                                                                                                                                         |
| Products            | Select the products associated with the literature. Use this field to allow the user to display the literature using the Products screen. The literature appears in My Briefing if the user tracks the product.                                                                                                                                                                                                                                                                                                                      |

| Field        | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organization | Select the organizations that have visibility to this data.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Web Display  | <p>Select a value to determine how to display the page if you are linking to a Web page.</p> <p><b>Frame.</b> Displays a link to the Web page. When the user clicks the link, the page appears in the current frame.</p> <p><b>Window.</b> Displays a link to the Web page. When the user clicks the link, the page appears in an expanded window. The user must use the Back button in the Web browser to return to Siebel ERM.</p> <p><b>New Window.</b> Displays a link to the Web page. When the user clicks the link, the page appears in a new browser window, allowing the user to switch between Siebel ERM and the Web page.</p> <p><b>In-Line.</b> Displays the entire Web page in the selected section of the portal page.</p> <p>Displaying Web pages in-line works best with simple Web pages. Large or complex pages, such as those that use JavaScript, can slow down the Siebel application and cause unexpected results. Be sure to test in-line pages before distributing them to users.</p> |

## Creating Translation Records

Translated literature files can be created using any of the previously listed software tools. You can create a record in the Siebel application for any translated file associated with your document. For more information, see [“Creating and Modifying Literature Files” on page 248](#).

### *To associate a translated document with a literature record*

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select an existing record.
- 3 Navigate to the Translations view.
- 4 In the Translation list, create a new record, and attach the translated document.

Make sure that the file name clearly indicates that this file is the translated file.

## Creating Literature Item Kits

After you have created multiple literature files, you can combine individual files and other material to create literature item kits. This feature allows you to combine individual literature items into groups, so you can work with the group instead of with the individual files. Literature item kits are used only as enclosures in correspondence.

For example, you might have a set of literature items for prospective customers, including promotional brochures for your most popular products. You might also include items that are not documents. For example, a promotional kit for one of your products might include a brochure, a specifications sheet, a coffee cup, and a T-shirt.

Creating a literature item kit makes it easier to send this information out. When the user adds an attachment to correspondence, the user has to select only one literature item kit instead of all the individual items. Then the fulfillment center can mail all the items with the correspondence.

When you create a literature item kit, you create a Literature record that represents the entire kit, and you associate Literature Item records with it that represent the items in the kit. The fulfillment center can view the Literature record, but cannot view the Literature Item records. To let the fulfillment center know which items make up the kit, you can:

- **Pack kits together at the fulfillment center.** For example, you have a kit named Sales Promo that includes a brochure and a hat. The brochure and hat might be shrink wrapped together at the fulfillment center, or they might be stored in one bin at the fulfillment center, so the fulfillment center can select one of each item in the bin. Then, when the fulfillment center sees that it must fulfill the Sales Promo literature record, it mails the shrink-wrapped package or the items from this bin.
- **Make the Literature record a bill of materials.** You can include a document in the Literature record that describes all the Literature Items in the kit, or use the Literature records Description or Synopsis field to list all the Literature Items in the kit. For example, if the kit consists of a sales brochure and a hat, then you can create a Literature record that represents the entire kit, you can attach two Literature Item records to it that represent the brochure and the hat, and you might also use the description field of the Literature record to say the kit includes a brochure and a hat. Then the fulfillment center reads the description field and mails the items listed.

### **To create a literature item kit**

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, create a new record or select an existing record.

This record represents the literature item kit, so give it a name that indicates the kit contents.

- 3 Navigate to the Literature Items view.

The fields that previously appeared in More Info are shown under the Literature list at the top of the view. The fields in the Literature Items list, in the middle of the view, display specific item information. The Component Items list appears at the bottom of the view.

- 4 In the Literature Items list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field         | Comments                                                                                                                                                                              |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary       | Select the check box to indicate this item is the primary item in the kit.                                                                                                            |
| Physical Form | Type a description of the item's physical form. This field supports multiple values to allow for multiple physical forms. For a document, you might choose 8 1/2 x 11 and Microfiche. |

| Field      | Comments                                                             |
|------------|----------------------------------------------------------------------|
| # of Pages | Type the number of pages in the document, if applicable.             |
| In Stock?  | Select the check box to specify the item is in stock, if applicable. |
| Part #     | Type the item's part number, if applicable.                          |

- 5 In the Component Items list, create a new record, select the record to add in the Add Literature Component Items dialog box, and click Add.
- 6 In the Component Items list, create any other new records that are needed to create the kit.

## About Making Literature Visible to Users

You can make literature visible to users in the following ways:

- **The Products Screen.** You can associate literature with a product, and the user can display it using the Products screen.
- **The Competitors Screen.** You can associate literature with a competitor, and the user can display it using the Competitors screen.
- **The Decision Issues Screen.** You can associate literature with a decision issue, and the user can display it using the Decision Issues screen.
- **The Correspondence Screen.** You can deselect the Internal field of a literature record and the user can select it as an enclosure in correspondence.
- **eBriefings.** You can associate literature with an account competitor, product, or industry. Literature appears in the Account Briefing, Competitor Briefing, or My Briefing page as a hyperlink.
- **The Literature Screen or Infocenter.** You can make literature visible to users, so it is included in the list of literature that they see in the Literature or Infocenter screen.

## Sharing Literature Through the Products Screen

Users who are salespeople find it useful to view literature about your products when they are viewing other information about the products. If you associate literature with a product, then users can view this literature when they view the product record in the Products screen.

### *To share literature through the Products screen*

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select a literature record or create a new literature record.
- 3 In the More Info form, select a product or part number in the Products field.

## Sharing Literature Through the Competitors Screen

Salespeople find it useful to view their competitors' literature or to view literature that your company has prepared that compares your products with your competitors. If you associate literature with a competitor, then users can view this literature when they view the competitor record in the Competitors screen.

To share literature through the Competitors screen, you must associate it with a competitor. You must also decide whether to select the Internal flag, which determines whether it appears in the Comparative Literature List or the Competitive Literature list of the Competitors screen:

- If you select the Internal flag, then the literature appears in the Comparative Literature list, and it is not available as an enclosure in the Correspondence screen.
- If you do not select the Internal flag, then the literature appears in the Competitive Literature list, and it is available as an enclosure in the Correspondence screen.

Whether you select Internal depends on the type of literature:

- **Competitors' literature.** Your salespeople might want to use literature produced by competitors, such as sales brochures, to help them compare your products with the products of competitors. However, you do not want to distribute this literature outside your company. Select Internal, so the literature is not available in the Enclosures list of the Correspondence screen, but it appears in the Comparative Literature in the Competitors screen.
- **Comparative literature for internal use.** You might develop comparative literature internally, such as competitive intelligence, that is meant for use by your salespeople and that you do not want to distribute outside your company. Select Internal, so the literature is not available in the Enclosures list of the Correspondence screen, but it appears in Comparative Literature in the Competitors screen.
- **Comparative literature for external use.** You might develop comparative literature internally that is aimed at your customers, or you might have third party comparative reports that you want to distribute to your customers. Do not select Internal, so the literature is available in the Enclosures list of the Correspondence screen, and it also appears in Competitive Literature in the Competitors screen.

### *To share literature through the Competitors screen*

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select a literature record, or create a new literature record.
- 3 In the More Info form, select the competitors in the Competitors field.

When users display this competitor record in the Competitors screen, they are able to see the literature in the Comparative Literature list if you select the Internal field in the More Info form or in the Competitive Literature list if you do not select this field.

## Sharing Literature Through the Decision Issues Screen

Users who are salespeople find it useful to view literature about a decision issue when they are viewing other information about the decision issue. If you associate literature with a decision issue, then users can view this literature when they view the decision issue.

### *To share literature through the Decision Issues screen*

- 1 Navigate to the Administration - Data screen, then the Decision Issues view.
- 2 In the Decision Issues list, select the decision issue to associate with the literature.
- 3 Navigate to the Literature view.
- 4 In the Literature list, create a new record, select the literature item to associate with the decision issue in the Add Literature dialog box, and click OK.

## Sharing Literature Through the Correspondence Screen

Users might want to use literature as enclosures in correspondence. They might also use literature records that represent literature item kits as enclosures in correspondence.

Literature is available to users in the correspondence screen if the Internal field of the Literature record is not selected.

### *To share literature through the Correspondence screen*

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select a literature record, or create a new literature record.

Make sure the Internal field of this record is not selected.

When users create correspondence, they are able to add this literature as an enclosure.

## Sharing Literature Through eBriefings

Siebel eBriefings are personalized pages that combine information from the Siebel database, such as links with a user's new opportunities or new service requests, with background information about businesses the user works with. The user can choose which customer accounts and competitors to track, and information about those businesses appear in the Account Briefing and Competitor Briefing view of that user's eBriefings screen. You can include links to literature about the account or competitor.

To share literature through eBriefings, you can associate it with Accounts, Competitors, Industries, or Products. For more information about Briefings, see *Siebel Briefings Administration Guide*.



**To share literature through eBriefings**

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select a literature record, or create a new literature record.
- 3 Navigate to the More Info view, and complete the fields in the following table.

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Release Date    | Select the date and time that you want the literature to first appear in briefings.<br><br>Literature associated with products or industries appears in My Briefing if you track those products and industries.                                                                                                                                                                                                                                                                     |
| Accounts        | Select the accounts with which the literature is associated in the Accounts field if you want to display the literature in Account Briefing. The users who are tracking those accounts see the literature item in the Account Briefing.<br><br>Select the competitors with which the literature is associated in the Accounts field if you want to display the literature in Competitor Briefing. Users must track those competitors for them to appear in the Competitor Briefing. |
| Expiration Date | Select the date that you want the literature to last appear in briefings                                                                                                                                                                                                                                                                                                                                                                                                            |

## Sharing Literature Through Literature or Infocenter

Your users can work with literature by displaying the Literature screen or Infocenter screen and searching the Literature list in that screen for the piece of literature they need.

You generally share literature with users by associating the user with access groups and associating literature with categories. But first you must create categories that include literature, create access groups that include users, and associate the categories with the access groups. For more information, see *Siebel Security Guide*.

After you have completed this preliminary work, you can assign literature to users as follows:

- When you produce new literature, associate it with the appropriate category and it is visible to all users in access groups associated with that category.
- When you hire new employees, associate them with the appropriate access group so that they have visibility to all the literature in categories associated with that category.

A business manager who administers literature can make it visible to users by associating it with the appropriate category in the Literature Administration screen. After it is assigned in this way, users in access groups associated with this category are able to display it in the Literature screen.

**To associate literature with a category using the Literature Administration screen**

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select the record for the literature to associate with a category.

- 3 Navigate to the Category view.
- 4 In the Categories list, create a new record, select the category to associate with the literature item in the Add Category dialog box, and click OK.

## **Associating Literature With a Category Using Catalog Administration Screen**

A business manager who administers literature can make it visible to users by associating it with the appropriate category in the Catalog Administration screen. After it is assigned in this way, users in access groups associated with this category are able to display it in the Literature screen.

### ***To associate literature with a category using the Catalog Administration screen***

- 1 Navigate to the Administration - Catalog screen, then the Catalog Administration view.
- 2 In the Catalogs list, drill down on the Name field of the catalog to associate with the literature.  
A Categories list appears.
- 3 Navigate to the Literature view.
- 4 In the Literature list, create a new record, select the literature item in the Add Literature dialog box, and click OK.

# 21 Global Target List Management

This chapter includes information about Global Target List Management. It includes the following topics:

- [About Global Target List Management on page 259](#)
- [Scenario for Managing Global Target Lists on page 260](#)
- [Process of Managing Global Target Lists on page 261](#)
- [Creating Target Lists by Querying \(End User\) on page 261](#)
- [Editing Target Lists \(End User\) on page 262](#)
- [Creating Target Lists By Combining Lists \(End User\)](#)
- [Applying Target Lists \(End User\) on page 263](#)
- [Creating Activities from Target Lists \(End User\) on page 263](#)
- [About Configuring Target Lists on page 264](#)

## About Global Target List Management

This topic includes the following topics:

- [“Global Target List Management Is for Siebel Industry Applications Only” on page 259](#)
- [“What Is Global Target List Management?” on page 259](#)
- [“What Kind of Lists Can Be Created?” on page 260](#)
- [“Where to Find More Information” on page 260](#)

### Global Target List Management Is for Siebel Industry Applications Only

The Global Target List Management applies only to Siebel Industry Applications, such as Siebel Life Sciences and Siebel Financial Services. Global Target List Management does not apply to Siebel Sales or Siebel Call Center.

### What Is Global Target List Management?

Global Target List Management is used to create reusable lists of party entities (accounts, contacts, employees, positions, and prospects) from many different views in the Siebel application. These lists can be applied in various views and can be used to create activities.

Target lists differ from PDQs (saved queries) in that target lists are static; the saved list contains a specific set of records. The records returned by a PDQ can vary over time as edits are made to the Siebel database.

Global Target List Management builds on the general List Management features that are available for both Siebel Industry Applications and non-Siebel Industry Applications.

Tasks you can perform with Global Target List Management that you cannot perform with general List Management are:

- Create lists in many views (not just in the List Management view).
- Apply lists in many views.
- Create lists of accounts and positions.
- Generate activities for records in a list.

### What Kind of Lists Can Be Created?

In the preconfigured Siebel application, you can create and apply target lists for contacts, accounts, positions, and employees.

However, the Siebel application can be configured for lists of prospects.

### Where to Find More Information

You can find more information about the following functionality:

- General List Management functionality, including field descriptions and instructions for importing and exporting lists. For more information, see *Siebel Marketing User Guide*.
- Call List functionality, which is unique to Financial Services. For more information, see *Siebel Finance Guide*.
- Professional and account targeting, which is unique to Siebel Pharma. For more information, see *Siebel Life Sciences Guide*.

## Scenario for Managing Global Target Lists

This topic gives one example of how global target list management might be used. You might use global target list management differently, depending on your business model.

An administrative assistant has been asked to send personalized birthday gifts to all of the company's top clients who have birthdays in the upcoming month, March. She uses Global Target List Management to help her create a set of activities, one activity for each gift she must purchase and send.

First, she notices that the company administrator has already prepared a list of the top clients. This top-client list is not a private list and so the list can be used by the administrative assistant.

Next, she queries for company contacts who have birthdays in March and saves these records to a private list, which she calls March-birthdays.

Then, she combines her March-birthdays list and the companies top-client list. The list resulting from this intersection contains the company's top clients who have birthdays in March.

The last step is to create an activity for each client in the final list. Each activity can be marked completed when the client's gift has been sent.

## Process of Managing Global Target Lists

To manage global target lists, complete the following tasks:

- [“Creating Target Lists by Querying \(End User\)” on page 261](#)
- [“Editing Target Lists \(End User\)” on page 262](#)
- [“Creating Target Lists By Combining Lists \(End User\)” on page 263](#)
- [“Applying Target Lists \(End User\)” on page 263](#)
- [“Creating Activities from Target Lists \(End User\)” on page 263](#)

## Creating Target Lists by Querying (End User)

The most usual way to create a target list is by querying and then saving to a target list some or all of the party records returned by the query.

The records that you save can be the records that are returned by the query. For example, if you query contacts, then you can save the contact records to a target list. The records that you save can also be the records that are *associated* with the records that are returned by the query. For example, if you query opportunities, then you can save the positions on the opportunities' sales teams to a target list. (You cannot save the opportunity records to a target list.)

This task is a step in [“Process of Managing Global Target Lists” on page 261](#).

### ***To create a target list by querying***

- 1** Navigate to a screen where target lists are enabled.
- 2** Perform a query.
- 3** On the toolbar, click Save Target List.

- 4 Complete the necessary fields in the Save to List dialog box.

Some fields are described in the following table.

| Field    | Comments                                                                                                                                                                                                                                                                                                                                                                         |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Based On | <p>Select a value from the drop-down list. The choices available depend on the view.</p> <p>You can save the records themselves, for example contacts or accounts. Or, you can save the contacts or positions (team) associated with the records. If multiple contacts or positions can be associated with the records, then you can choose to save all or only the primary.</p> |
| Private  | <p>Select the check box to indicate only you can view and apply this list.</p> <p>Clear the check box to indicate all users can view and apply this list.</p>                                                                                                                                                                                                                    |

## Editing Target Lists (End User)

You can add and delete records from saved target lists.

This task is a step in [“Process of Managing Global Target Lists” on page 261](#).

### To edit a target list

- 1 Navigate to the List Management screen, then the Lists view.

To navigate to this view, you can click Save and Edit in the Save to List dialog box described in [Step 4 on page 262](#).

- 2 Drill down on the List Name field for a target list record.
- 3 Navigate to the appropriate view as described in the following table.

| If the Target List Contains... | Then Use This View to Add or Delete from the List...                                                                                                   |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Accounts                       | Accounts                                                                                                                                               |
| Team members                   | Positions                                                                                                                                              |
| Contacts                       | <p>All Contacts, My Contacts, or List Contacts and Prospects</p> <p><b>NOTE:</b> The My Contacts view filters the list to show only your contacts.</p> |
| Employees                      | Employees                                                                                                                                              |

## Creating Target Lists By Combining Lists (End User)

You can create new lists by combining existing lists. Lists can be combined as unions or intersections.

This task is a step in [“Process of Managing Global Target Lists” on page 261](#).

### *To create a target list by combining other lists*

- 1 Navigate to the List Management screen, then the Lists view.
- 2 Select the lists you want to combine.
- 3 Click Create Union or Create Intersection.

## Applying Target Lists (End User)

After you or an administrator create target lists, you can apply them. To apply a target list, you must be in a target list-enabled view.

When you apply a target list to a view, you do not add the records in the list to the view. Instead, you restrict the records that you can add to the view to only those records that exist in the target list.

This task is a step in [“Process of Managing Global Target Lists” on page 261](#).

### *To apply a target list*

- 1 Navigate to a screen where target lists are enabled.
- 2 On the toolbar, click Apply Target List.
- 3 In the Apply Target List dialog box, complete the following steps:
  - a Select one or more lists.
  - b Select the Respect Existing Query check box to preserve the current query.  
Records appear only if they are in both the list and the current query.
  - c Click OK, Union, or Intersection to apply the lists.

## Creating Activities from Target Lists (End User)

From the List Management screen, you can create activities for each member in a list.

How fields for the activities are completed, including which fields are copied from the list member records, is determined by “activity templates.” These templates are set up by the Siebel administrator. In the preconfigured Siebel application, the “activity templates” can be applied only for lists of contacts. For more information, see [“Setting Up Data Map Object “Activity Templates” for Target Lists” on page 264.](#)

This task is a step in [“Process of Managing Global Target Lists” on page 261.](#)

### ***To create an activity for each party in a list***

- 1 Navigate to the List Management screen, then the Lists view.
- 2 Select a list record.
- 3 Click Create Activity.
- 4 In the Create Activity dialog box, select an “activity template.”

“Activity templates” are described in the following table.

| “Activity Template”   | For each contact in the list, creates...             |
|-----------------------|------------------------------------------------------|
| Customer Status Call  | A high priority activity of type Call - Outbound.    |
| Customer Status Email | A high priority activity of type Email - Outbound.   |
| End Information Email | A medium priority activity of type Email - Outbound. |
| Targeted Call         | An activity of type Targeted Call.                   |

**NOTE:** These “activity templates” are data map objects created through the Data Transfer Utilities. They are not the same as the activity templates used to create activity plans.

## About Configuring Target Lists

Some aspects of configuring Global Target List Management include:

- [“Setting Up Data Map Object “Activity Templates” for Target Lists” on page 264](#)
- [“About Workflows for Global Target List Management” on page 265](#)
- [“Configuring Global Target List Management to Create Activities Asynchronously” on page 265](#)
- [“Enabling Application of Target Lists on an Applet” on page 266](#)
- [“Enabling Saving of Target Lists in an Applet” on page 268](#)

## Setting Up Data Map Object “Activity Templates” for Target Lists

Some activity template data map objects are provided in seed data. These templates are listed in [Step 4 on page 264.](#)



You can edit these objects or create your own objects, using those provided as a model. For more information about Data Map Objects, see *Siebel Finance Guide*.

## About Workflows for Global Target List Management

Four workflows for Global Target List Management are provided in seed data. [Table 72](#) describes these workflows.

Table 72. Workflows for Global Target List Management

| Workflow                      | Description                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SLM Create Activity From List | This workflow can be used to create activities asynchronously. For more information, see <a href="#">“Configuring Global Target List Management to Create Activities Asynchronously” on page 265</a> .                                                                                                                                                                                  |
| SLM Edit Call List Workflow   | This workflow is triggered by the Save and Edit button in the Save to List dialog box. This workflow takes the user to the List Mgmt Lists View of the List Management screen.                                                                                                                                                                                                          |
| SLM List Operation - Generic  | This workflow is triggered when the Create Union and Create Intersection buttons are clicked.<br><br>Modification of this workflow is not recommended.                                                                                                                                                                                                                                  |
| SLM Update Parent             | This workflow is triggered when a new member (such as a contact or an account) is added to a list. The workflow checks the content type of the new member and updates the Content field for the list if necessary.<br><br>For example, if an account is added to a list of contacts, then the Content field changes to Hybrid.<br><br>Modification of this workflow is not recommended. |

## Configuring Global Target List Management to Create Activities Asynchronously

In the preconfigured Siebel application, when the Create Activities for List command (Create Activity button) is invoked, activities are created synchronously. If your users typically create activities for long lists, then the response time for synchronous creation can be slow. To resolve this issue, you can configure the Siebel application to create the activities asynchronously.

### *To configure asynchronous activity creation from target lists*

- 1 In Siebel Tools, change the On Close Invoke Parent Method user property for the SLM Create Activity Popup applet from the default value of ContinueCreateActivity to ContinueCreateActAsync.

**2** Activate the SLM Create Activity From List workflow.

For general information about Siebel workflows, see *Siebel Business Process Framework: Workflow Guide*.

## Enabling Application of Target Lists on an Applet

You can configure list applets and association list applets so that target lists can be applied to them.

In order for a list applet to be configurable, the business component on which the applet is based must contain a multi-value ID field for the list category (accounts, contacts, employees, positions, or prospects).

### *To configure list and association list applets so that target lists can be applied*

**1** Create a multi-value link between the applet's business component and the List Mgmt Lists business component where:

- Destination Business Component is List Mgmt Lists.
- Destination Link is one of the following (as appropriate for the list category that is applied in the applet):
  - SLM Account/List Mgmt Lists
  - Contact/List Mgmt Lists
  - Employee/List Mgmt Lists
  - Position/List Mgmt Lists
  - Prospects/List Mgmt Lists

For example, the SIS Account List Applet is based on the Account business component; it contains a List Mgmt Lists multi-value link, where Destination Link is SLM Account/List Mgmt Lists.

**2** Create a multi-value field for the applet's business component where:

- Multivalue Link is the multi-value link created in [Step 1](#).
- Field is ID.

**3** For the applet's business component, create a TargetProp (or TargetProp 1, TargetProp 2, and so on) user property, and enter a value for the user property in the following form:

*"Entity Display Name", "Multi-Value Field Name", "List Category"*

where:

- *Entity Display Name* is a name for the user property.
- *Multi-Value Field Name* is the name of the field created in [Step 2](#).

- *List Category* is one of the display values defined for the SLM\_LST\_CATEGORY LOV: Accounts, Contacts, Employees, Positions, or Prospects.

For example, “Accounts”, “List Mgmt List Id”, “Accounts”

- 4 Repeat [Step 1](#) to [Step 3](#) for each category of list that you want to apply to the applet.
- 5 (If you are configuring a list applet, then skip to [Step 6](#).) If you are configuring an association list applet, then create an Apply List button for the applet by completing the following steps:
  - a Create the ButtonApplyList control for the applet.

The values for the new control are described in the following table.

| Field          | Value           |
|----------------|-----------------|
| Name           | ButtonApplyList |
| Caption        | Apply List      |
| HTML Type      | MiniButton      |
| Method Invoked | ShowPopup       |

- b Create two control user properties for the new ButtonApplyList control.

The values for the two control user properties are described in the following table.

| Field | Value for 1st User Property | Value for 2nd User Property           |
|-------|-----------------------------|---------------------------------------|
| Name  | Mode                        | Popup                                 |
| Value | Edit List                   | SIA Apply Target List Applet - Simple |

- c Edit the Applet Web Template for the association applet to add the new ButtonApplyList control to the applet’s layout.
- 6 (Optional) Add an Apply List item to the menu for the cogwheel icon in the applet by completing the following steps:
  - a Create an Applet Menu Method Item for the applet.
  - b If the applet’s business component contains:
    - Only one TargetProp user property, then set Command to Apply List Popup-Simple.
    - Multiple TargetProp user properties for the applet, then set the command property to Apply List Popup.
  - c Set Menu Text to Apply List.

**NOTE:** If you do not complete this step, then a target list can still be applied by using the Apply Target List button in the toolbar or by selecting File in the application-level menu, then Apply List.

## Enabling Saving of Target Lists in an Applet

You can configure list applets so that target lists can be saved from them.

In order for a list applet to be configurable, the business component on which the applet is based must contain an ID field for the party entity that you want to save to the list.

### To enable target list saving for a list applet

- 1 In Siebel Tools, create a Save Target List Source *n* user property for the applet, where *n* is a consecutive integer starting from 1.

For example, the first user property that you create for the applet is named Save Target List Source 1, the second is named Save Target List Source 2, and so on.

- 2 Find or create the list column for the party entity that you want to save by completing the following steps:
  - a On the applet's business component, locate the ID field of the party entity.
  - b If the applet does not have a list column that maps to that ID field, then create the list column.
- 3 Enter a value for the user property of the following form:

*"List Column", "Saved Entity Name", "PrimaryOnly", "Extra Src Field 1", "Extra Dst Field 1", "Extra Src Field 2", "Extra Dst Field 2"*

where:

- *List Column* is the name of a list column identified in [Step 2](#). The Field value for this list column is the source business component field for the target list. This field must be an ID field.  
  
The Display Name value for this list column is used in the Based On drop-down list in the Save to List dialog box. (Required)
- *Saved Entity Name* is the content of target list that you are saving (for example, Contact, Employee, Account, Position, or Prospect). (Required)
- *PrimaryOnly* saves only the primary record of the multi-value group to the target list when the list column corresponds to a multi-value ID field. If this term is not specified or empty, then all records in the multi-value group are saved to the target list. This term is required only if the list column or the additional source field corresponds to a multi-value field.
- *Extra Src Field 1* is the name of an additional source field to save to the target list. (Optional)
- *Extra Dst Field 1* is the destination field name for Extra Src Field 1. This field must exist in the list member's applet and corresponding business component so that it can be seen in the List Management screen. This term is required only if Extra Src Field 1 is specified.
- *Extra Src Field 2* is the name of an additional source field to save to the target list. (Optional)
- *Extra Dst Field 2* is the destination field name for Extra Src Field 2. This term is required only if Extra Src Field 2 is specified.

For example, these properties applied to the SIS Account List Applet follow:

- Save Target List Source 1 = “SLM Position - Primary”, “Position”, “PrimaryOnly”  
Saves the primary team member on the accounts.
- Save Target List Source 2 = “SLM Contact”, “Contact”, “ ”, “Main Phone Number”, “Acct Phone Number”  
Saves all contacts and the main phone number of the account with each contact.

**NOTE:** For this example, the destination list member business component (SLM List Member - Contact) must have a field that can store the account phone number.

- 4 Repeat [Step 1](#) and [Step 3](#) to create a user property for each type of list that you want users to be able to create in that applet.



# 22 D&B Integration

This chapter describes the integration of D&B data with your Siebel application. It includes the following topics:

- [About D&B Data on page 271](#)
- [Scenarios for Using D&B on page 272](#)
- [About the D&B D-U-N-S Number on page 273](#)
- [Integrating D&B Data on page 273](#)
- [Setting Up the Symbolic URL for Access to the D&B Database on page 286](#)
- [Configuring D&B Integration on page 288](#)
- [Field Mappings for Configuration of D&B Integration on page 291](#)

## About D&B Data

D&B is a leading provider of business information. D&B's information and technology solutions help businesses find profitable customers, reduce credit risk, manage receivables, and manage vendors. D&B's database of commercial information consists of over 75 million records world wide.

For connected users, you can use your Siebel application to integrate with D&B data and reports. As a mobile client, you can access D&B data for accounts and contacts that have been promoted from D&B marketing data.

This integration allows you to:

- Use D&B marketing data within your Siebel application.
- Access D&B business and credit reports from within your Siebel application.

You can use this D&B data to support the following:

- **New Business or Customer Acquisition.** By querying on company size, line of business, and other criteria provided by D&B, you can generate lists of prospects to add to the sales pipeline or to support outbound marketing programs. By using the D&B corporate family linkage information, you can identify new prospects and opportunities within a company's extended family.
- **Customer Segmentation and Penetration.** You can profile specific market segments such as geography, industry, size, and other criteria to identify untapped opportunities or better align sales territories.
- **Customer Qualification.** Use your access to D&B business and credit reports to obtain detailed background and risk information about a company to focus sales efforts on higher-probability accounts and shorten the sales cycle.

## Scenarios for Using D&B

This topic describes how D&B might be used. You might use D&B differently, depending on your business model. This topic includes the following scenarios:

- [“Building and Growing Current Customer Relationships” on page 272](#)
- [“Acquiring New Businesses or Customers” on page 272](#)
- [“Managing Customer Satisfaction and Account Planning” on page 272](#)
- [“Searching D&B for New Account Information” on page 273](#)

### Building and Growing Current Customer Relationships

A company can increase market penetration across its existing customer base by determining how many relationships the company already has within a corporate family structure. Sales managers and representatives can use D&B D-U-N-S numbers to view the organizational hierarchies of clients and aggregate account attributes at each level.

For example, a sales representative plans to sell computers to 20 business locations and he discovers that there are locations for this company that he has not yet contacted. In another situation, the sales manager might want to see a rollup of opportunities and the potential revenue for each subsidiary and location for a specific company on a worldwide basis.

### Acquiring New Businesses or Customers

Because a sales organization is always looking for more leads to new business, sales professionals can access company information in the Siebel D&B database, allowing them to generate prospects in their territories.

With D&B, the sales representative can query the Siebel D&B database using criteria to target new leads. The sales representative can query using demographic data, revenue profiles, or other criteria. After generating a list of leads, the sales representative can automatically add the companies and contacts to their company's accounts list. These promoted accounts and contacts are automatically updated when D&B updates occur.

### Managing Customer Satisfaction and Account Planning

Standardizing customer information about the D&B D-U-N-S number gives you a means for house-holding your customer data and eliminating duplicate customer records. This elimination increases your ability to manage existing customer relationships because all opportunities for a customer are linked to the same customer record.

Add D&B's corporate family linkage, and you have the ability to manage and plan for customers at a local and global level. For example, you might want to see a roll up of all opportunities and potential revenue for all companies and locations related to a particular company worldwide.



## Searching D&B for New Account Information

Sales professionals can access the D&B database in real time to find and retrieve new D&B account information that is immediately available for use within Siebel Sales. This information includes company demographic, corporate linkage, and address data maintained by D&B.

For example, a sales representative discovers a new opportunity, but the representative cannot find the account in either the Siebel account list or the D&B account list. Instead of creating a new account, the sales manager performs a real-time D&B search to obtain up-to-date, quality information that can be used to automatically establish a new Siebel account. Consequently, the sales team is provided with valuable information that they can use when working on the new opportunity.

## About the D&B D-U-N-S Number

The D-U-N-S (Data Universal Numbering System) number is a crucial component of D&B data. A D&B D-U-N-S number is a nonindicative, nine-digit number assigned to each business location in the D&B database. Each D-U-N-S number has a unique, separate, and distinct operation and is maintained solely by D&B. Industries and organizations around the world use the D&B D-U-N-S number as a global standard for business identification and tracking.

Each company has a unique D&B D-U-N-S number associated with it. It acts as a unique identifier for a company in the D&B database.

To uniquely identify the association between different companies in the D&B database, each company also has associated D&B D-U-N-S numbers.

The categories of D&B D-U-N-S numbers include:

- **D&B D-U-N-S Number.** Each unique business location listed in the D&B database is assigned a D&B D-U-N-S number. This number is called DUNS Number in your Siebel application.
- **Global Ultimate D-U-N-S.** The D&B D-U-N-S number belonging to a business's worldwide ultimate parent company.
- **Domestic Ultimate D-U-N-S.** The D&B D-U-N-S number belonging to the highest-level family member within a specific country.
- **Parent/HQ D-U-N-S.** The D&B D-U-N-S number belonging to a business's immediate headquarters or parent.

These numbers allow D&B to establish the relationships between different companies.

## Integrating D&B Data

Integrating D&B data into the D&B Account tables and the Siebel Account tables in the Siebel database involves the following tasks:

- 1 "Obtaining D&B Data" on page 274
- 2 "Loading D&B Data" on page 275
- 3 "Running the Siebel Update Server Components" on page 283

Administrators can integrate D&B data with Siebel UCM (Universal Customer Master) using the same process they use to integrate D&B data with the Siebel database. For real time integration, they insert the D&B record into the Source Data History (SDH) table in UCM (instead of promoting the D&B record directly into the base table). The UCM batch workflow processes the record from the SDH table. Alternatively, the real time connector workflow can process the record. For batch integration, administrators can create a D&B source file, and import the records in the same manner as they import records from any external application. For information about the ERD for UCM, see the applicable *Siebel Data Model Reference* on My Oracle Support.

## Obtaining D&B Data

You must obtain the following data files from D&B:

- The Marketing Data file
- The MRC file
- The SIC file

Request these files in *Siebel format*, also referred to as 2202 or GDMDI data file format. D&B is able to provide files in this format without difficulty.

To obtain MRC and SIC files, send email to the following address:

[dnb4siebel@dnb.com](mailto:dnb4siebel@dnb.com)

In addition to these files, you can request D&B data layout documentation from D&B.

**The Marketing Data File.** This file contains detailed company information, such as the company's legal name, address, contact information, and so on.

**The MRC and SIC Files.** These files are reference files that the Siebel D&B modules require. Both files contain information referenced by the demographic company data provided by D&B.

MRC stands for Management Responsibility Code. The MRC file contains a list of lookup values for the contacts and their positions such as CEO, Vice President of Marketing, and so on. Each contact has an associated numerical code that is referenced by the D&B marketing data to determine the title or position of a company contact.

SIC stands for Standard Industrial Classification and is a code developed by the Federal government to describe the type of activity performed by the business at this location. The SIC file contains a list of SIC codes assigned and maintained by D&B along with their definitions. D&B's Primary SIC code indicates the line of business that provides the largest revenue contribution to the business. D&B also maintains and assigns six levels of subsidiary SIC codes to describe in greater detail additional lines of business activity for a company. By default, the SIC code provided in the SIC file and the Marketing Data file is the 4-digit SIC code.

## Loading D&B Data

After you have obtained the three D&B data files, you can start to load the data into the Siebel database. You can load the files in any order, but you must load all three files before running the Siebel update server component.

Data loading scripts and processes differ according to your database. When creating your data loading scripts, see the documentation provided by D&B and the applicable *Siebel Data Model Reference* on My Oracle Support.

**NOTE:** When you integrate D&B data for the first time, you might want to obtain sample loading scripts for use as templates. For help obtaining sample loading scripts, create a service request (SR) on My Oracle Support. For more information, see [“Loading D&B Data Using Sample Scripts” on page 276](#).

The scripts load D&B data into staging tables in the Siebel database. [Table 73](#) shows these staging tables. For definitions of these tables, see the applicable *Siebel Data Model Reference* on My Oracle Support.

Table 73. Staging Tables for Uploading D&B Data

| File                | Upload Location                                                                                      |
|---------------------|------------------------------------------------------------------------------------------------------|
| Marketing Data file | S_DNB_UPDATE table<br>This table is used as a staging area for the un-normalized D&B Marketing data. |
| SIC file            | S_DNB_SIC table                                                                                      |
| MRC file            | S_DNB_MRC table                                                                                      |

Because SIC and MRC files change rarely, updating D&B data usually requires deleting and reloading the D&B marketing data in the S\_DNB\_UPDATE table alone.

If you must load new versions of the SIC and MRC files, then you must delete the previously used staging tables.

[Table 74](#) lists the D&B data to delete and to load.

Table 74. D&B Data to Delete and Load

| If You Are...                       | Then...                                                                           |
|-------------------------------------|-----------------------------------------------------------------------------------|
| Loading D&B data for the first time | ■ Load the following D&B data files: Marketing Data file, SIC file, and MRC file. |

Table 74. D&amp;B Data to Delete and Load

| If You Are...                                                                                | Then...                                                                                                                                                                                                                        |
|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Updating D&B data with a new Marketing Data file, but the SIC and MRC files have not changed | <ul style="list-style-type: none"> <li>■ Delete data from the S_DNB_UPDATE table.</li> <li>■ Load the Marketing file.</li> </ul>                                                                                               |
| Updating D&B data with new Marketing Data, SIC, and MRC files                                | <ul style="list-style-type: none"> <li>■ Delete data from the S_DNB_UPDATE, the S_DNB_SIC, and the S_DNB_MRC tables.</li> <li>■ Load the following D&amp;B data files: Marketing Data file, SIC file, and MRC file.</li> </ul> |

After loading files, you must run the D&B Update Manager (D&B) and the D&B Update Manager (Siebel). For more information, see [“About Siebel Update Server Components” on page 279](#).

## Loading D&B Data Using Sample Scripts

This topic provides some guidance about how to use sample scripts for:

- [“Loading D&B Data on Oracle” on page 276](#)
- [“Loading D&B Data on DB2” on page 277](#)
- [“Loading D&B Data on Microsoft SQL Server” on page 278](#)

**CAUTION:** Before running scripts, check them against the D&B data layout documentation and against the S\_DNB\_UPDATE table columns. Then, modify the scripts as required. For information about the S\_DNB\_UPDATE table columns, see the applicable *Siebel Data Model Reference on My Oracle Support*.

### Loading D&B Data on Oracle

Oracle installations require you to run SQLLOADER control files. You need the following control files:

- s\_dnb\_update.ctl (for loading Marketing Data file into S\_DNB\_UPDATE table)
- s\_dnb\_sic.ctl (required only if loading the SIC file)
- s\_dnb\_mrc.ctl (required only if loading the MRC file)

**NOTE:** This procedure assumes that you understand how to run SQLLOADER. SQLLOADER is described in the Oracle documentation.

#### To load D&B data if you are using Oracle

- 1 Verify that the column order of your D&B file matches the column requirements in the CTL file before running the loading script.

**2** Truncate the appropriate staging tables.

For more information, see [Table 74 on page 275](#).

To optimize loading performance, drop all indexes on the S\_DNB\_UPDATE table and re-create them after the scripts have completed by using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

**3** Modify the SQL file as appropriate for:

- The name of your database
- The D&B filename and directory location
- The database table owner
- The user ID and password (with loading privileges) that you are using to load the data

**4** Run SQLLOADER.

## Loading D&B Data on DB2

DB2 installations require you to run DB2 IMPORT. You need the following SQL files:

- imp\_update\_new.sql (for loading Marketing Data file into S\_DNB\_UPDATE table)
- imp\_sic\_new.sql (required only if loading the SIC file)
- imp\_mrc\_new.sql (required only if loading the MRC file)

**NOTE:** This procedure assumes that you understand how to run DB2 IMPORT. DB2 IMPORT is described in the DB2 documentation.

### *To load D&B data if you are using DB2*

**1** Verify that the column order of your D&B file matches the column requirements in the SQL file before running the loading script.

**2** Truncate the appropriate staging tables.

For more information, see [Table 74 on page 275](#).

To optimize loading performance, drop all indexes on the S\_DNB\_UPDATE table and re-create them after the scripts have completed by using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

**3** Modify the SQL file as appropriate for:

- The name of your database
- The D&B filenames and directory location
- The database table owner
- The user ID and password (with loading privileges) that you are using to load the data

**4** Run DB2 IMPORT.

- 5 (Optional) After running the import scripts, update the DB2 catalog statistics by executing RUNSTATS on the three tables that received the D&B data (S\_DNB\_MRC, S\_DNB\_SIC, S\_DNB\_UPDATE).

## Loading D&B Data on Microsoft SQL Server

Microsoft SQL Server installations require you to run SQL scripts. You need the following format files and SQL scripts:

- For loading the Marketing Data file:
  - S\_DNB\_UPDATE.fmt. A format file to load the data into the tempS\_DNB\_UPDATE table
  - S\_DNB\_UPDATE.sql. An SQL script that loads the data into S\_DNB\_UPDATE table
- For loading the SIC file:
  - S\_DNB\_SIC.fmt. A format file to load the data into the tempS\_DNB\_SIC table
  - S\_DNB\_SIC.sql. An SQL script that loads the data into the S\_DNB\_SIC table
- For loading the MRC file:
  - S\_DNB\_MRC.fmt. A format file to load the data into the tempS\_DNB\_MRC table
  - S\_DNB\_MRC.sql. An SQL script that loads the data into the S\_DNB\_MRC table

**NOTE:** This procedure assumes that you understand how to run bcp (bulk copy process) or similar data-loading utility. The bcp utility is described in the Microsoft SQL Server documentation.

### To load D&B data if you are using Microsoft SQL Server

- 1 Verify that the column order of your D&B file matches the column requirements in the SQL file before running the loading script.
- 2 Truncate the appropriate staging tables.

For more information, see [Table 74 on page 275](#).

To optimize loading performance, drop all indexes on the S\_DNB\_UPDATE table and re-create them after the scripts have completed by using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

- 3 Modify the SQL file as appropriate for:
  - The name of your database
  - The D&B filename and directory location
  - The database table owner
  - The user ID and password (with loading privileges) that you are using to load the data
- 4 Run bcp or another data loading utility.

## About Siebel Update Server Components

When you load or reload D&B data, you must update the D&B Account tables and the Siebel Account tables in the Siebel database. This update is accomplished by running server components:

- D&B Update Manager (D&B). Moves D&B marketing data from the staging table (S\_DNB\_UPDATE) into the normalized D&B Account tables, which are the basis for the D&B All Accounts View. For more information, see [Figure 6 on page 280](#).
- D&B Update Manager (Siebel). Updates the records in the Siebel Account tables for accounts with matching D-U-N-S numbers. For more information, see [Figure 7 on page 281](#).
- A third component, D&B Update Manager MultiTask, is also provided. This component can be used in place of D&B Update Manager (D&B) or D&B Update Manager (Siebel) to run the update using multiple, parallel processes. For more information, see [“Multiple Task Siebel Update Server Component” on page 281](#).

## Overview of the Update Process

This topic outlines the process of loading D&B data from the staging tables to the D&B Account tables through to updating the Siebel account tables.

This process recommends using the D&B Update Manager MultiTask server component to run server component tasks in parallel. However, use of the single task D&B Update Manager (D&B) and D&B Update Manager (Siebel) server components is also documented in this chapter.

- 1 Make sure you have loaded the D&B data into the staging tables.  
For more information, see [“Loading D&B Data” on page 275](#) and [“Loading D&B Data Using Sample Scripts” on page 276](#).
- 2 Update the D&B Account tables with data from the staging tables:
  - a To optimize performance, you can perform one of the following steps:
    - ❑ For first time data loading when there are no D&B records in the Siebel database, drop the indexes on the following D&B Account tables: S\_DNB\_ORG, S\_DNB\_ORG\_SIC, S\_DNB\_CON\_MRC, and S\_PRSP\_CONTACT.
    - ❑ For subsequent updates, drop the indexes on the S\_DNB\_ORG table only, all except for the indexes S\_DNB\_ORG\_U1 (DUNS\_NUM), S\_DNB\_ORG\_P1 (ROW\_ID), and S\_DNB\_ORG\_M01 (the clustered index) on this table.
  - b Create a search specification on the D-U-N-S number to set up your preferred batch sizes and determine the corresponding D-U-N-S number ranges for each batch for loading the data from the staging tables to the D&B Account tables.
  - c Execute concurrent D&B Update Manager (D&B) server tasks by running the D&B Update Manager MultiTask server component.  
For more information, see [“Multiple Task Siebel Update Server Component” on page 281](#) and [“Running the Siebel Update Server Components” on page 283](#).
  - d Continue to execute the concurrent D&B Update Manager (D&B) server tasks until all data is loaded into the D&B Account tables.

- e If you dropped indexes on the D&B Account tables, then re-create them by using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).
- 3 Update the Siebel Account tables from the D&B Account tables for accounts with matching D-U-N-S numbers by executing concurrent D&B Update Manager (Siebel) server tasks using the D&B Update Manager MultiTask server component.

For more information, see [“Multiple D&B Update Manager \(Siebel\) Processes” on page 282](#) and [“Running the Siebel Update Server Components” on page 283](#).

## Single Task Siebel Update Server Components

The update server components are part of the Dun and Bradstreet Enterprise Component Group. This group and each of its D&B Batch Components must be enabled. After enabled, each component can be run as a batch task. [Figure 6](#) shows how the staging tables are mapped to the D&B Account tables.

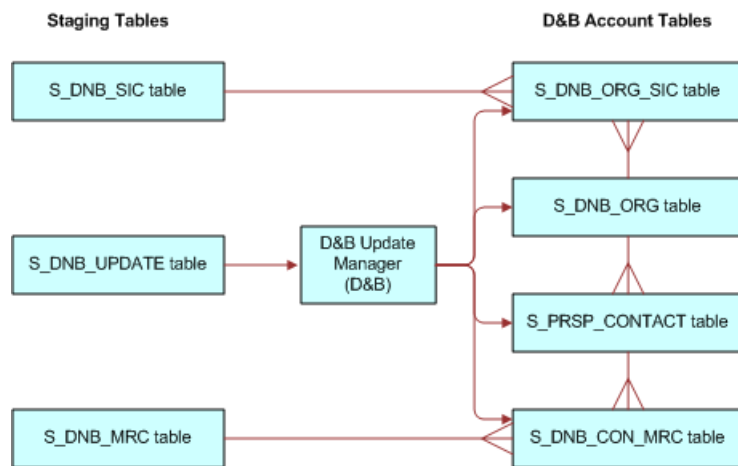


Figure 6. D&B Update Manager (D&B) Table Names



Figure 7 shows how the D&B Account tables are mapped to the Siebel Account tables.

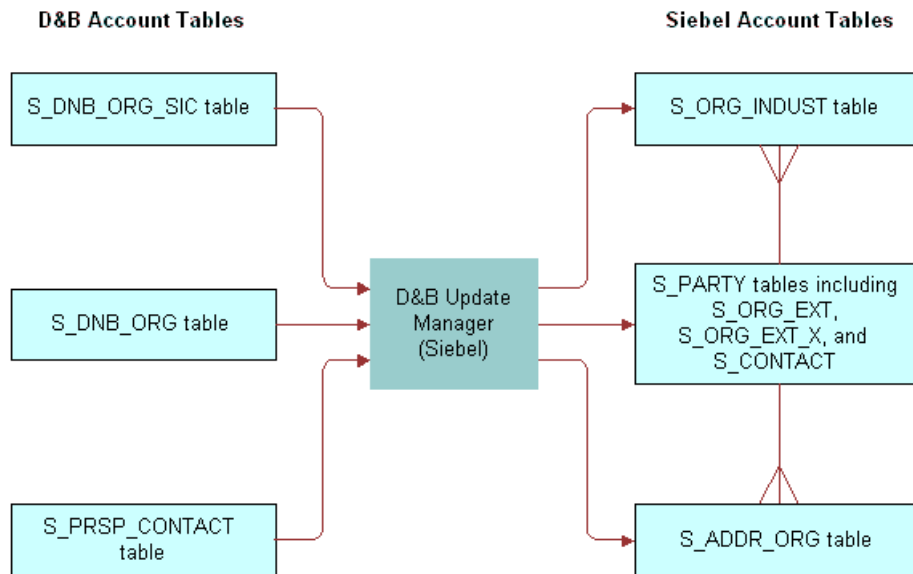


Figure 7. D&B Update Manager (Siebel) Table Names

Default table mapping exists from the D&B Account tables to the Siebel Account tables that are used by the D&B Update Manager (Siebel) server component. For more information, see [“Field Mapping for the D&B Update Manager Process” on page 292](#).

## Multiple Task Siebel Update Server Component

You can use the server component DNBUpMgrMultiTask to spawn multiple Update Manager processes. Running several parallel processes helps you maximize your performance with large data loads and gives you greater scheduling flexibility. You can control the number of processes that are created by editing the dnbtask.cfg file. The dnbtask.cfg file contains two sections, a section to set tasks for the D&B Update Manager (D&B) process and a section to set tasks for the D&B Update Manager (Siebel) process.

The dnbtask.cfg file is located in the sqltempl subdirectory, in the server installation directory.

## Multiple D&B Update Manager (D&B) Processes

By default the dnbtask.cfg file uses D-U-N-S number ranges to set up three simultaneous tasks. The DNBUpMgrDNB portion of the file looks as follows:

```

[DNB]

Task1 = ,1000000000

Task2 = 1000000000,2000000000

Task3 = 2000000000,
  
```

These three ranges translate into the following three DNBUpMgrDNB tasks, each taking care of loading records within a particular D-U-N-S number range:

- ,100000000 means D-U-N-S numbers < 100000000.
- 100000000,200000000 means D-U-N-S numbers >=100000000 and < 200000000.
- 200000000, means D-U-N-S numbers >=200000000.

Edit the file to change the number of parallel processes created or the range of D-U-N-S numbers updated.

**CAUTION:** If you use DNBUpMgrMultiTask to run multiple UpdateMgr processes, then you must make sure that processes running at the same time have *mutually exclusive* ranges. Unpredictable results occur if multiple processes collide.

## Multiple D&B Update Manager (D&B) Processes with First Time Data Loading

The first time you load D&B data when there are no D&B records in the Siebel database, you can use a special SQL file (dnbinitial.sql) which is optimized to load only inserts. Consequently, data is loaded faster than when you use the dnbmaps.tsq file.

To use the dnbinitial.sql file, set the server component parameter DNBConfigFile to dnbinitial.sql. For examples, see [“Running the Siebel Update Server Components” on page 283](#).

For subsequent updates, the DNBConfigFile is set to dnbmaps.tsq.

**NOTE:** The dnbinitial.sql file assumes that you dropped the indexes on the D&B Account tables when loading data. For more information, see [“Loading D&B Data Using Sample Scripts” on page 276](#).

## Multiple D&B Update Manager (Siebel) Processes

By default the dnbtask.cfg file uses the tables updated to set up five simultaneous tasks. The DNBUpMgrSieb portion of the file looks as follows:

```
[Siebel]

Task1 = UPDATE_SIEBEL_ACCOUNT

Task2 = UPDATE_INDUST, COMMIT, UPDATE_SIEBEL_INDUST, COMMIT,
UPDATE_SIEBEL_SYNONYM

Task3 = UPDATE_SIEBEL_ADDR_PHY, COMMIT, UPDATE_SIEBEL_ADDR_MAIL

Task4 = UPDATE_SIEBEL_CONTACT

Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT, UPDATE_SIEBEL_LOC3
```

You can edit the file to change the number of parallel processes created. However, the order of the updates within individual tasks is important; for example UPDATE\_INDUST must be done before UPDATE\_SIEBEL\_INDUST. Use caution when updating the DNBUprMgrSieb portion of the dnbtask.cfg file.

**CAUTION:** If you have modified the RTI configuration file to insert new accounts into the Siebel Accounts table, then do not run the multiple task process. Instead you must run the single task D&B Update Mgr (Siebel) server component. Make sure you have modified the dnbmaps.sql file used by the single task server component. The order of the updates is critical to data integrity if new accounts are being added.

## Running the Siebel Update Server Components

You can run the Siebel update server components in the following ways:

- From within the Siebel application
- From a command line interface, using Siebel Server Manager

**NOTE:** If you have just installed the Siebel Server or if you have made changes to the Siebel Name Server, then you must synchronize before running the Siebel update server component. For more information about synchronizing server components, see *Siebel System Administration Guide*.

**TIP:** If you are going to run the D&B Update Mgr (Multi-task) component, then make sure that the maximum number of tasks (MaxTasks parameter) is set correctly to accommodate the number of tasks that you specified in the dnbtask.cfg file. For information about MaxTasks, see *Siebel System Administration Guide*.

Make sure that the D&B Update Manager (D&B) process is complete before you start the D&B Update Manager (Siebel) process. For general information about using Siebel Server Manager, see *Siebel System Administration Guide*.

### Running the D&B Update Manager Server Component From Within Your Siebel Application (Single Task Process)

Complete the following procedure to run the D&B Update Manager (D&B) server component from within your Siebel application (single task process). For information about running server components, see *Siebel System Administration Guide*.

#### **To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)**

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Submit a component job for D&B Update Mgr (D&B); make sure to set the Mode to Asynchronous.
- 3 When the D&B Update Mgr (D&B) is done, open the log directory.

If there have been problems with the process, then you can review a log file. The log file is DNBUprMgrDNB\_TaskNumber.log.

## Running the D&B Update Manager Server Component From Within Your Siebel Application (Multiple Task Process)

Complete the following procedure to run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process).

### *To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)*

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Prepare a component job for D&B Update Mgr (Multi-task):
  - Make sure to set the Mode to Asynchronous.
  - Create a job parameter where Name is Task Code (Abbreviation is DNBTaskCode) and Value is DNB.
  - If the data is being loaded for the first time, then create a job parameter where Name is Configuration File Name (Abbreviation is DNBConfigFile) and Value is dnbinital.sql.
- 3 Submit the component job.
- 4 When the process is done, open the log directory.

If there have been problems with the process, then you can review a log file.

## Running the D&B Update Manager Server Component From Within Your Siebel Application (Single Task Process)

Complete the following procedure to run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process).

### *To run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process)*

- 1 Check that the Dun and Bradstreet component group is enabled.
- 2 Submit a component job for D&B Update Mgr (Siebel); make sure to set the Mode to Asynchronous.
- 3 When the D&B Update Mgr (Siebel) is done, open the log directory.

If there have been problems with the process, then you can review a log file. The log file is DNBUpMgrDNB\_TaskNumber.log.

## Running the D&B Update Manager Server Component From Within Your Siebel Application (Multiple Task Process)

Complete the following procedure to run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process).

**To run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process)**

- 1 Check that the Dun and Bradstreet component group is enabled.
  - 2 Prepare a component job for D&B Update Mgr (Multi-task):
    - Make sure to set the Mode to Asynchronous.
    - Create a job parameter where Name is Task Code (Abbreviation is DNBTaskCode) and Value is Siebel.
  - 3 Submit the component job.
  - 4 When the process is done, open the log directory.
- If there have been problems with the process, then you can review a log file.

**Running the D&B Update Manager Server Component From a Command Line (Single or Multiple Task Process)**

Complete the following procedure to run the D&B Update Manager (D&B) server component from a command line (single or multiple task process).

**To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)**

- 1 Log in to the server using Server Manager, and use a command with the following format:
 

```
SIEBEL_ROOT\siebsrvr\bin>srvrmgr /g gateway /e enterprise_name /u db_username /p password /s siebserver
```

An example follows:

```
>srvrmgr /g evlab6 /e siebel /u sadmin /p password /s evlab6
```
  - 2 At the srvrmgr prompt, enter one of the following commands:
    - start task for comp DNBUpmgrDNB (for single task process)
    - start task for comp DNBUpmgrMultiTask with DNBTaskCode=DNB (for multitask process)
    - start task for comp DNBUpmgrMultiTask with DNBTaskCode=DNB, DNBConfigFile=dnbinitial.sql

For initial data loading, see [“Multiple D&B Update Manager \(D&B\) Processes with First Time Data Loading” on page 282](#).
  - 3 During the DNBUpmgrDNB or DNBUpmgrMultiTask server process, monitor the status by entering the following list task command:
 

```
list task for comp DNB%
```
  - 4 When the D&B Update Mgr (D&B) or D&B Update Mgr (Multi-task) server process is finished, open the log directory.
- If there have been problems with the process, then you can review log files. The log files are DNBUpmgrDNB\_TaskNumber.log and DNBUpmgrMultiTask\_TaskNumber.log.

## Running the D&B Update Manager Server Component From a Command Line (Single or Multiple Task Process)

Complete the following procedure to run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process).

### *To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)*

- 1 Log in to the server using Server Manager, and use a command with the following format:

```
SIEBEL_ROOT\siebsrvr\bin>srvrmgr /g gateway /e enterprise_name /u db_username /p password /s siebserver
```

An example follows:

```
>srvrmgr /g evlab6 /e siebel /u sadmin /p password /s evlab6
```

- 2 At the srvrmgr prompt, enter one of the following commands:
  - start task for comp DNBUpMgrSIEB (for single task process)
  - start task for comp DNBUpMgrMultiTask with DNBTaskCode=Siebel (for multitask process)
- 3 During the DNBUpMgrDNB or DNBUpMgrMultiTask server process, monitor the status by entering the following list task command:

```
list task for comp DNB%
```
- 4 When the D&B Update Mgr (D&B) or D&B Update Mgr (Multi-task) server process is finished, open the log directory.

If there have been problems with the process, then you can review log files. The log files are DNBUpMgrDNB\_TaskNumber.log and DNBUpMgrMultiTask\_TaskNumber.log.

## Setting Up the Symbolic URL for Access to the D&B Database

When you have a connection to the Internet and have a D&B account set up already (with a user ID and password), you can:

- Obtain the most current account information by invoking real-time searches of the D&B database and online purchase.
- Access and order D&B business and credit reports.

To access D&B data live from your Siebel application through the D&B Web site, you must first contact D&B for a user ID, password, and payment options. Then you can set up your Siebel application to access the D&B database. For more information about D&B reports and about searching D&B for new accounts, see ["Accessing Company Data and Reports with D&B" on page 299](#).

### *To set up the symbolic URL for D&B real-time search and update*

- 1 Navigate to the Administration - Integration screen, then the WI Symbolic URL List.

- 2 From the visibility filter, select Symbolic URL Administration.
- 3 In the Symbolic URL list, select DNBGlobalAccess.
- 4 Make sure the URL is as follows:  
`https://globalaccess.dnb.com/access/scripts/broker.asp`
- 5 In the Symbolic URL Arguments list:
  - a Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.  
**NOTE:** This field is not case-sensitive.
  - b Select the USERPASS record, and enter the password provided by D&B in the Argument Value field.

## Setting Up the Symbolic URL for D&B Report Ordering

Complete the following procedure to set up the symbolic URL for D&B report ordering.

If you are using Siebel eBriefings and want to enable a link from briefing documents to the D&B report ordering site, then see *Siebel Briefings Administration Guide*.

### To set up the symbolic URL for D&B report ordering

- 1 Navigate to the Administration - Integration screen, then the WI Symbolic URL List.
- 2 From the visibility filter, select Symbolic URL Administration.
- 3 In the Symbolic URL list, select DNBReport.
- 4 Make sure that the Host Name is `www.dnb.com` and that the URL is as follows:  
`https://reportserver/scripts/ProductRetriever`
- 5 In the Symbolic URL Arguments list:
  - a Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.  
**NOTE:** This field is not case-sensitive.
  - b Select the USERPSWD record, and enter the password provided by D&B in the Argument Value field.
- 6 From the visibility filter, select Host Administration.
- 7 In the list of HTTP hosts, make sure that there is a record where Name is `www.dnb.com` and Virtual Name is `reportserver`.

# Configuring D&B Integration

Table 75 provides general guidance about configuration.

Table 75. Configuration Guidelines

| If You Must Customize the...                                                               | Then...                                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Single task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)   | <ul style="list-style-type: none"> <li>Edit the dnbmaps.sql file in the ...\\siebelserver\\SQLTEMPL directory.</li> </ul>                                                                 |
| Multiple task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel) | <ul style="list-style-type: none"> <li>Edit the dnbmaps.tsq file in the ...\\siebelserver\\SQLTEMPL directory.</li> </ul>                                                                 |
| Account promotion                                                                          | <ul style="list-style-type: none"> <li>Configure the maps listed in Table 81.</li> <li>Determine and make corresponding changes, if necessary, in the update server processes.</li> </ul> |

Specific configuration topics include:

- “Update Server Process Configuration” on page 288
- “Account Promotion and Prospect List Creation Configuration” on page 289
- “Running the D&B Update Manager (D&B) Process Without Updating or Deleting Existing Data” on page 289
- “Running the D&B Update Manager (Siebel) Process Without Updating Account Name” on page 290
- “Running the D&B Update Manager (Siebel) Process Without Updating Account Location (Single Task)” on page 291
- “Running the D&B Update Manager (Siebel) Process Without Updating Account Location (Multiple Task)” on page 291

**TIP:** When debugging in your test environment, increase the event log level to 4 to see more details in the log file. However, it is strongly recommended that you set the level to 1 (the default) when you run in a production environment to prevent the log file from overflowing. For information about event logging, see *Siebel System Monitoring and Diagnostics Guide*.

## Update Server Process Configuration

The D&B update server processes use the Batch Real-Time Integration (RTI) technology and the RTI configuration files (dnbmaps.sql for single task and dnbmaps.tsq for multiple tasks). You can edit the RTI configuration files to suit your business requirements.

The general syntax of the RTI maps specified in the configuration files is as follows:

UPDATE\_SOME\_TABLE.MOD1TABLE = [Target Table to update]

UPDATE\_SOME\_TABLE.MOD1WHERE = [A WHERE clause]



```
UPDATE_SOME_TABLE.MOD1INSERT = [TRUE/FALSE]
UPDATE_SOME_TABLE.MOD1UPDATE = [TRUE/FALSE]
UPDATE_SOME_TABLE.MOD1DELETE = [TRUE/FALSE]
UPDATE_SOME_TABLE.MOD1SQL = [A Valid SQL Query]
```

The RTI configuration files are located in the ...\\siebelserver\\SQLTEMPL directory. For the default mapping for the D&B Update Manager (Siebel) server component, see [“Field Mapping for the D&B Update Manager Process” on page 292](#).

Use caution when making changes to these RTI configuration files. It is recommended that you engage a qualified professional for your customization process.

**CAUTION:** Do not change the default DELETE setting in the existing UPDATE\* sections. Do not set DELETE to TRUE. If your business need necessitates deleting rows in the target table as part of the D&B Update Manager process, then you can request help by creating a service request (SR) on My Oracle Support.

## Account Promotion and Prospect List Creation Configuration

You can select specific fields that are populated by the D&B promotion to a Siebel account or by the D&B list-creation process. These fields are controlled by maps in the business component user properties within the DNB Account and DNB Contact business components. These maps are listed in [Table 81 on page 296](#).

Using Siebel Tools, you can change, add, or delete source and destination field mapping. See the map descriptions in [Table 81 on page 296](#) to determine the map to use for a set of source and destination fields.

Use caution when making changes to these maps. It is recommended that you engage a qualified professional for your customization process.

**CAUTION:** Although the delete capability is available, it is recommended that you deactivate unwanted map entries instead of deleting them. This approach is safer and can be accomplished by checking or clicking the deactivate column for the unwanted entry.

You can create an entry using the following syntax:

```
Name Column: [MAP NAME]: [DESTINATION FIELD]
Value Column: [D&B SOURCE FIELD]
```

**NOTE:** Each map works only with a specific Destination Business Component and a specific Source Business Component.

## Running the D&B Update Manager (D&B) Process Without Updating or Deleting Existing Data

Depending on your business process, you might want to run the D&B Update Manager (D&B) server component without updating or deleting any existing data in the S\_DNB\_ORG table. You edit the RTI configuration file to perform this task.

***To edit the RTI configuration file so that existing data in the S\_DNB\_ORG table is not updated or deleted***

- 1 Open the RTI configuration file (dnbmaps.sql for single task or dnbmaps.tsq for multiple task) in a text editor.
- 2 Search for the UPDATE\_DNB\_ACCOUNT section under [Common] heading.
- 3 Modify the section to look like the following:

```
UPDATE_DNB_ACCOUNT.Function = NONE

UPDATE_DNB_ACCOUNT.MOD1TABLE = S_DNB_ORG

UPDATE_DNB_ACCOUNT.MOD1WHERE = WHERE 1 = 1

UPDATE_DNB_ACCOUNT.MOD1INSERT = TRUE

UPDATE_DNB_ACCOUNT.MOD1UPDATE = FALSE

UPDATE_DNB_ACCOUNT.MOD1DELETE = FALSE

UPDATE_DNB_ACCOUNT.MOD1TXNLOG = FALSE
```

If you are using the default file, then only change UPDATE\_DNB\_ACCOUNT.MOD1UPDATE from TRUE to FALSE.

- 4 Save and close the file.

**Running the D&B Update Manager (Siebel) Process Without Updating Account Name**

You might want to run the D&B Update Manager (Siebel) server component without updating the existing account names. You edit the RTI configuration file to perform this task.

***To edit the RTI configuration file so that account names are not updated***

- 1 Open the RTI configuration file (dnbmaps.sql for single task or dnbmaps.tsq for multiple task) in a text editor.
- 2 Search for UPDATE\_SIEBEL\_ACCOUNT.MOD1SQL under the Oracle, Oracle 8, Microsoft SQL Server, or DB2 statements.
- 3 Search for dnb.BUSINESS\_NAME within the UPDATE\_SIEBEL\_ACCOUNT.MOD1SQL SELECT statement.
- 4 Comment out the line that begins dnb.BUSINESS\_NAME... as shown.

```
UPDATE_SIEBEL_ACCOUNT.MOD1SQL =

SELECT acct.ROW_ID          ROW_ID,

    ;dnb.BUSINESS_NAME      NAME,
```

- 5 Save and close the file.

## Running the D&B Update Manager (Siebel) Process Without Updating Account Location (Single Task)

You might want to run the D&B Update Manager (Siebel) server component without updating the existing account locations. You edit the RTI configuration file to perform this task. Complete the following procedure to edit the RTI configuration file so that account locations are not updated (single task).

### *To edit the RTI configuration file so that account locations are not updated (single task)*

- 1 Open the `dnbmaps.sql` file in a text editor.
- 2 Search for the `UPDATE_SIEBEL = UPDATE_SIEBEL_ADDR_PHY...` statement.  
This statement specifies the Siebel Table Groups to be updated when D&B Update Manager (Siebel) server component is run.
- 3 Within this statement, remove `COMMIT, UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT, UPDATE_SIEBEL_LOC3`.
- 4 Save and close the file.

## Running the D&B Update Manager (Siebel) Process Without Updating Account Location (Multiple Task)

You might want to run the D&B Update Manager (Siebel) server component without updating the existing account locations. You edit the RTI configuration file to perform this task. Complete the following procedure to edit the RTI configuration file so that account locations are not updated (multiple task).

### *To edit the RTI configuration file so that account locations are not updated (multiple task)*

- 1 Open the `dnbtask.cfg` file in a text editor.
- 2 Under the `[Siebel]` section, comment out the line that begins `Task5...` as shown.  

```
;;Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT,
UPDATE_SIEBEL_LOC3
```
- 3 Save and close the file.

# Field Mappings for Configuration of D&B Integration

The following topics provide field mapping information:

- [“Field Mapping for the D&B Update Manager Process” on page 292](#)
- [“Field Mapping for D&B Real-Time Updates” on page 294](#)

■ [“Field Mapping for Account Promotion and Prospect Lists” on page 296](#)

## Field Mapping for the D&B Update Manager Process

**D&B Update Manager (D&B) server component.** For the table mapping for the D&B Update Manager (D&B) component, examine the appropriate tables ([Figure 6 on page 280](#)) using Siebel Tools. The default field mappings can be determined by examining the UPDATE\_DNB\* sections of the RTI configuration file (dnbmaps.sql or dnbmaps.tsq).

**D&B Update Manager (Siebel) server component.** [Table 76 on page 292](#), [Table 77 on page 293](#), and [Table 78 on page 294](#) list the fields that are mapped when the D&B Update Manager (Siebel) server component is run. For more information, see [Figure 7 on page 281](#).

The field mappings can also be determined by examining the UPDATE\_SIEBEL\* sections of the RTI configuration file. For information about changing these default mappings, see [“Update Server Process Configuration” on page 288](#).

[Table 76](#) shows the S\_DNB\_ORG table mapping for D&B Update Manager (Siebel).

Table 76. S\_DNB\_ORG Table Mapping for D&B Update Manager (Siebel)

| From Column        | To Table   | To Column         |
|--------------------|------------|-------------------|
| DUNS_NUM           | S_ORG_EXT  | DUNS_NUMBER       |
| BUSINESS_NAME      | S_ORG_EXT  | NAME              |
| TRADESTYLE         | S_ORG_SYN  | NAME              |
| SCND_TRADESTYLE    | S_ORG_SYN  | NAME              |
| PHYS_STREET_ADDR   | S_ADDR_ORG | ADDR              |
| SECOND_STREET_ADDR | S_ADDR_ORG | ADDR              |
| PHYSICAL_CITY      | S_ADDR_ORG | CITY              |
| PHYSICAL_STATE     | S_ADDR_ORG | PROVINCE or STATE |
| PHYSICAL_ZIP       | S_ADDR_ORG | ZIPCODE           |
| COUNTRY_NAME       | S_ADDR_ORG | COUNTRY           |
| COUNTY_NAME        | S_ADDR_ORG | COUNTY            |
| MAIL_ADDRESS       | S_ADDR_ORG | ADDR              |
| MAIL_ADDRESS_2     | S_ADDR_ORG | ADDR              |
| MAIL_CITY          | S_ADDR_ORG | CITY              |
| MAIL_STATE         | S_ADDR_ORG | STATE             |
| MAIL_ZIP           | S_ADDR_ORG | ZIPCODE           |
| TELEPHONE          | S_ORG_EXT  | PH_NUM            |
| FAX_NUMBER         | S_ORG_EXT  | FAX_PH_NUM        |

Table 76. S\_DNB\_ORG Table Mapping for D&amp;B Update Manager (Siebel)

| From Column        | To Table    | To Column        |
|--------------------|-------------|------------------|
| ANNL_SLS_AMT       | S_ORG_EXT_X | ATTRIB_14        |
| CURRENCY_CODE      | S_ORG_EXT   | BASE_CURCY_CD    |
| EMPLOYEES_TOTAL    | S_ORG_EXT_X | ATTRIB_26        |
| EMPLOYEES_HERE     | S_ORG_EXT   | EMP_COUNT        |
| YEAR_STARTED       | S_ORG_EXT_X | ATTRIB_27        |
| LOC_TYPE_STAT_IND  | S_ORG_EXT   | included in LOC  |
| PUBLIC_PRIVATE_IND | S_ORG_EXT_X | ATTRIB_08        |
| GLBLULT_DUNS_NUM   | S_ORG_EXT   | GLBLULT_DUNS_NUM |
| DOM_ULT_DUNS_NUM   | S_ORG_EXT   | DOM_ULT_DUNS_NUM |
| PAR_DUNS_NUM       | S_ORG_EXT   | PAR_DUNS_NUM     |
| LINE_OF_BUSINESS   | S_ORG_EXT_X | ATTRIB_03        |
| PCT_GROWTH_SLS_3YR | S_ORG_EXT_X | ATTRIB_15        |

Table 77 shows the S\_PRSP\_CONTACT table mapping for D&B Update Manager (Siebel). The S\_PRSP\_CONTACT table contains information about the D&B contacts such as the name of the CEO and various company executives. D&B provides up to four contacts for each D&B account.

Table 77. S\_PRSP\_CONTACT Table Mapping for D&amp;B Update Manager (Siebel)

| From Column      | To Table  | To Column        |
|------------------|-----------|------------------|
| LAST_NAME        | S_CONTACT | LAST_NAME        |
| FST_NAME         | S_CONTACT | FST_NAME         |
| MID_NAME         | S_CONTACT | MID_NAME         |
| PER_TITLE        | S_CONTACT | PER_TITLE        |
| PER_TITLE_SUFFIX | S_CONTACT | PER_TITLE_SUFFIX |
| JOB_TITLE        | S_CONTACT | JOB_TITLE        |
| SEX_MF           | S_CONTACT | SEX_MF           |

Table 78 shows the S\_DNB\_ORG\_SIC table mapping for D&B Update Manager (Siebel). The S\_DNB\_ORG\_SIC table contains the Standard Industrial Classification (SIC) code developed by the US Government. The code is assigned to businesses and other organizations by classifying and subdividing the activity performed by that establishment at that location. D&B provides up to six SICs for each D&B account. In the D&B Update Manager process, the primary SIC code is mapped to the S\_INDUST table and all SIC codes are mapped to the S\_ORG\_INDUST table.

Table 78. S\_DNB\_ORG\_SIC Table Mapping for D&B Update Manager (Siebel)

| From Column | To Table     | To Column    |
|-------------|--------------|--------------|
| ROW_ID      | S_INDUST     | PR_INDUST_ID |
|             | S_ORG_INDUST | INDUST_ID    |

Table 79 describes how address and contact information is updated by the D&B Update Manager (Siebel) process.

Table 79. Update Rules for Addresses and Contacts

| If This D&B Information Changes...                            | Then...                                             |
|---------------------------------------------------------------|-----------------------------------------------------|
| Street address<br>City<br>(Abbreviated) state                 | A new address record is added to the Address table. |
| Address information other than street address, city, or state | The address record is updated in the Address table. |
| Phone number<br>Fax number                                    | The address record is updated in the Address table. |
| Contact first name or<br>Contact last name                    | A new contact record is added to the Contact table. |
| Contact information other than first or last name             | The contact record is updated in the Contact table. |

## Field Mapping for D&B Real-Time Updates

When you purchase account information through the D&B Web site using the D&B real-time search and update feature in the Siebel application, certain fields in the Siebel business components are populated. These fields are a subset of the fields that are populated by the D&B Update Manager (D&B) server component. For example, D&B does not provide the contact first, last, and middle names fields in the real-time update.

[Table 80](#) lists the fields that can be populated or updated when you purchase account information using the D&B real-time search and update feature.

Table 80. Fields Populated by D&B Real-Time Search and Update

| <b>D&amp;B WorldBase Marketing Plus with Linkage</b> | <b>Siebel Business Component Name.Field Name</b> |
|------------------------------------------------------|--------------------------------------------------|
| Business Structure Code (Location Type)              | DNB Account.Location Type                        |
| Domestic Ultimate Name                               | DNB Account.Domestic Ultimate Business Name      |
| Global Ultimate Name                                 | DNB Account.Global Ultimate Business Name        |
| Parent/HQ Business Name                              | DNB Account.Parent HQ Name                       |
| Physical State                                       | DNB Account.State Name                           |
| Business Name                                        | DNB Account.Business Name                        |
| Trade Style                                          | DNB Account.Trade Style                          |
| Street Address                                       | DNB Account.Physical Address                     |
| Mail Address                                         | DNB Account.Mail Address                         |
| City Name                                            | DNB Account.Physical City                        |
| Mail City Name                                       | DNB Account.Mail City                            |
| Physical State/Province Abbreviation                 | DNB Account.Physical State                       |
| Mailing State/Province Abbreviation                  | DNB Account.Mail State                           |
| ZIP/Postal Code                                      | DNB Account.Physical Zip                         |
| Mail Postal/ZIP Code                                 | DNB Account.Mail Zip                             |
| Country Name                                         | DNB Account.Country Name                         |
| D&B D-U-N-S Number                                   | DNB Account.DUNS Number                          |
| Telephone Number                                     | DNB Account.Main Phone 2                         |
| Cable/Telex Code                                     | DNB Account.Cable Telex Number                   |
| Facsimile Number                                     | DNB Account.Main Fax 2                           |
| National ID                                          | DNB Account.National Identification Number 2     |
| SIC Code                                             | DNB Account.SIC Code                             |
| Primary Local Activity Code                          | DNB Account.Primary Local Activity Code          |
| Year Started                                         | DNB Account.Year Started 1                       |
| Employees Here                                       | DNB Account.Employee Here                        |
| Employees Total                                      | DNB Account.Employee Total                       |
| Annual Sales US Dollars                              | DNB Account.Sales Volume                         |
| Annual Sales Local                                   | DNB Account.Annual Sales Local Currency          |

Table 80. Fields Populated by D&amp;B Real-Time Search and Update

| D&B WorldBase Marketing Plus with Linkage | Siebel Business Component Name.Field Name |
|-------------------------------------------|-------------------------------------------|
| Legal Status                              | DNB Account.Legal Status                  |
| Subsidiary Code                           | DNB Account.Subsidiary Indicator          |
| Import / Export / Agent Ind.              | DNB Account.Import Export Code            |
| Global Ultimate D&B D-U-N-S Number        | DNB Account.Global Ultimate DUNS          |
| Global Ultimate Indicator                 | DNB Account.Global Ultimate Indicator     |
| Global Ultimate WorldBase Country Code    | DNB Account.Global Ultimate Country Code  |
| Domestic Ultimate D&B D-U-N-S Number      | DNB Account.Domestic Ultimate DUNS        |
| Headquarter/Parent D&B D-U-N-S Number     | DNB Account.Parent HQ DUNS                |
| HQ/Parent WorldBase Country Code          | DNB Account.Parent/HQ Country Code        |

## Field Mapping for Account Promotion and Prospect Lists

When users promote D&B accounts or create prospect lists from the D&B screen, fields in the DNB Account and DNB Contact business components are mapped to fields in other business components. [Table 81](#) lists these maps. These maps can be viewed in detail in the Business Component User Properties window of Siebel Tools. For information about promoting accounts and creating prospect lists, see [Chapter 31, "Opportunities \(End User\)."](#)

Table 81. Maps of D&amp;B to Siebel Fields for Promotion and List Creation

| User Property Prefix and Map Name | D&B Source Business Component | Siebel Destination Business Component | Process and Description                                                                                |
|-----------------------------------|-------------------------------|---------------------------------------|--------------------------------------------------------------------------------------------------------|
| Account Map                       | DNB Account                   | Account                               | Promotion.<br>Specifies the fields in DNB Account that is copied to Account business component.        |
| Contact Map                       | DNB Contact                   | Contact                               | Promotion.<br>Specifies the fields in DNB Contact that is copied to Contact business component.        |
| Mailing Address Map               | DNB Account                   | Business Address                      | Promotion.<br>Specifies the mailing address fields in DNB Account that is copied to Business Address.  |
| Physical Address Map              | DNB Account                   | Business Address                      | Promotion.<br>Specifies the physical address fields in DNB Account that is copied to Business Address. |



Table 81. Maps of D&amp;B to Siebel Fields for Promotion and List Creation

| User Property Prefix and Map Name | D&B Source Business Component | Siebel Destination Business Component | Process and Description                                                                                                                                                                         |
|-----------------------------------|-------------------------------|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prospect Info Map                 | DNB Contact                   | List Mgmt Prospective Contact         | Create Prospect List.<br>Specifies the biological information (such as last name, first name, and so on).                                                                                       |
| Prospect Contact Info Map         | DNB Account                   | List Mgmt Prospective Contact         | Create Prospect List.<br>Specifies the contact information (such as company, address, phone number, and so on) fields in the DNB Account that is copied into the List Mgmt Prospective Contact. |



# 23 D&B Integration (End User)

This chapter describes how to use D&B data and reports to manage customer relationships, acquire new customers, and create high quality new account records. It includes the following topics:

- [Accessing Company Data and Reports with D&B on page 299](#)
- [Viewing D&B Aggregate Data for a Company on page 299](#)
- [Promoting a D&B Account on page 300](#)
- [Creating a Prospect List from D&B Data on page 300](#)
- [Viewing a D&B Report on page 301](#)
- [Using Global Integration to Add New D&B Accounts on page 301](#)

## Accessing Company Data and Reports with D&B

The D&B screen allows you to access D&B marketing data as well as business and credit reports from within your Siebel application.

You can directly access D&B data for use in prospecting, qualifying leads, and generating marketing lists. You also can integrate D&B data and reports into your Siebel application, allowing you to perform the following tasks:

- Use D&B information to standardize data for your customer accounts.
- Access D&B business and credit reports.
- Search D&B for new accounts.
- Generate prospect lists from D&B relationships and demographic data.
- View account hierarchies and related opportunities across a corporate family structure.

## Viewing D&B Aggregate Data for a Company

When you have the D&B account information loaded into your Siebel application, some views allow you to use the data and view company hierarchies. The following procedure explains how to view aggregate data for a company using the D&B screen.

**NOTE:** D&B data for a company is read-only until the company is promoted to a Siebel account. For more information, see [“Promoting a D&B Account” on page 300](#).

### *To view aggregate data*

- 1 Navigate to the D&B screen.
- 2 In the D&B Accounts list, select the account for which you want to view the aggregate data.
- 3 In the More Info form, query for the accounts by specifying your criteria in the appropriate fields.  
A list of D&B accounts that meet your criteria appear.

**NOTE:** If the DUNS # (number) field does not appear in the list, then use the Columns Displayed option in the menu for the cogwheel icon to display the field.

## Promoting a D&B Account

You can use the D&B list to locate accounts that are potential sales leads. After you identify accounts that meet your criteria, you can promote the accounts into your accounts list.

### *To promote a D&B account*

- 1 Navigate to the D&B screen, then the D&B Accounts list.
- 2 In the D&B Accounts list, select the company or companies that you want to add to your accounts list.
  - To select a sequence of account records, hold down the SHIFT key and click the account records.
  - To select multiple accounts that are not in sequence, hold down the CTRL key and click the account records.
- 3 In the D&B Accounts list, click Promote Account.

A check mark appears in the Promoted field and the company is added to your Siebel application.

Drill down on the Business Name field to view the account profile and related contacts.

**NOTE:** The Data Validation Manager uses a set of user defined rules to validate business component data. When you promote one or more accounts, each account is created individually without consideration for parent and child relationships. The Duns number is checked, and the account name to check whether the account already exists in the account name is checked. Therefore, it is recommended that you exclude promoted accounts from the data validation business processing.

## Creating a Prospect List from D&B Data

You can use D&B data to generate sales leads. One way to use sales leads is to create a prospect list for your telesales or sales team to contact.

### *To create a prospect list*

- 1 Navigate to the D&B screen, then the D&B Account List view.

- 2 Select the company or companies that you want to include in your list, and then click Create D&B List.

The contacts associated with the company or companies are added to a prospect list.

- 3 To view the prospect list, navigate to the D&B Lists view.
- 4 In the D&B Lists list, select the list and drill down on the List Name field to view accounts on the list.

## Viewing a D&B Report

After a D&B report order is set up by your administrator, you can view business and credit reports from within your Siebel application. This information can also be viewed from the Accounts screen's D&B Reports view.

### *To view a D&B report*

- 1 Navigate to the D&B screen.
- 2 In the D&B Accounts list, select the company for which you want to view reports.
- 3 Navigate to the Reports view.

The D&B report for the selected company appears.

## Using Global Integration to Add New D&B Accounts

After a D&B Global Integration access is set up by your administrator, you can access D&B real-time within your Siebel application and enter criteria to locate new accounts in the D&B database. Search criteria can include the business name with state or province and country information, D&B D-U-N-S number, local business ID, and telephone number.

When you execute a search for new D&B accounts, the search criteria is sent to D&B's Global Integration, along with the user's D&B account name and password. When D&B receives the information, Global Integration automatically uses the criteria to select the single best search method to execute. D&B calculates the criteria matches and returns the number to Siebel. If there are no matches for the criteria, then the requestor is notified.

At this point, you can opt to purchase the account information, or cancel the Global Integration search process. If an account is purchased, then data received from D&B is added to the Siebel D&B tables and is available in D&B All Accounts view.

**NOTE:** If the selected account already exists in your Siebel D&B database, then the account is not purchased.

### *To initiate D&B's Global Integration search*

- 1 Navigate to the D&B screen, then the D&B Accounts List view.

- 2 Click Search D&B for New Account.
- 3 In the Search D&B dialog box, complete the necessary fields for the query.

You must enter sufficient data to initiate a query in the United States. For example, in the Search D&B form you can enter the business name, state or province, and country name, the D-U-N-S number and country name, the local business ID and country name, or the phone number and country name. If you enter only the business name, then the search fails because the data is insufficient.

The Search D&B query fields are described in the following table.

| Field          | Comments                                                                                                                                                                                                                                                               |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business Name  | Type the business name and type or select the address information.                                                                                                                                                                                                     |
| Street Address | The business name and address search is the most commonly used search method. At a minimum, the business name and country must be included. For Canadian businesses, the province must also be included.                                                               |
| City           |                                                                                                                                                                                                                                                                        |
| State/Province |                                                                                                                                                                                                                                                                        |
| Country Name   | When you are searching for a business by name, do not use wildcard characters (*) for unknown characters in the name.                                                                                                                                                  |
| ZIP Code       | Additional information such as town, street address, and postal code, can be included to increase the chances of finding an exact match.                                                                                                                               |
| DUNS #         | Type a known D&B D-U-N-S number to verify the identity of a business. The D&B D-U-N-S number must contain only nine numeric characters (no spaces, dashes, and so on). If you type a value in this field, then you must also select a value in the Country Name field. |

| Field             | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Local Business ID | <p>Type a value for the local business identifier. Many countries have their own numbering schemes to identify local businesses. Normally, this scheme is a government-sponsored schema for the purpose of business registration and tax filing.</p> <p>The local business ID submitted in a search must contain only numeric characters (no spaces, dashes, and so on). If you type a value in this field, then you must also select a value in the Country Name field.</p> <p>D&amp;B Global Integration supports searching by the following local business identifiers.</p> <p>Australia-CAN</p> <p>Belgium-BTW/TVA</p> <p>France-SIREN</p> <p>Germany-Hr. Number</p> <p>Ireland-Company House</p> <p>Italy-CCIAA</p> <p>Netherlands-KvK Nr</p> <p>Portugal-Fiscal</p> <p>Spain-CIF/NIF</p> <p>Sweden-Company House</p> <p>United Kingdom-Company House</p> |
| Phone #           | <p>Type the telephone number as dialed from <i>within</i> the country, including the area code or city code if required. Do not include the international long distance code (country code).</p> <p>For example 9086655000 for a search in New Jersey, US; 9055686000 for a search in Ontario, Canada; 01494422000 for a search in High Wycombe, England; 0104009400 for a search in Rotterdam, Netherlands.</p> <p>The telephone number must contain only numeric characters (no spaces, dashes, and so on).</p>                                                                                                                                                                                                                                                                                                                                              |

4 After you have entered the criteria, click Search D&B.

5 In the Search D&B list of results, select an account, and then click Purchase.

You can click Refine Query to modify the query criteria, and you can click Cancel to return to the D&B Accounts list without purchasing.

The purchased account is highlighted in the D&B Accounts list.





# 24 **Contacts**

This chapter includes information about administering and using contacts. It includes the following topics:

- [About Contacts on page 305](#)
- [Scenario for Managing Contacts on page 305](#)
- [Adding a Contact on page 306](#)
- [Promoting a Personal Contact to a Contact on page 308](#)
- [Creating a Profile for a Contact on page 308](#)
- [Adding a Contact to a Synchronization List on page 309](#)
- [Assessing a Contact on page 309](#)
- [Synchronizing Contact Information with External Applications on page 310](#)

## **About Contacts**

Contacts are individuals with whom your company conducts business or expects to conduct business in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. Contacts can be associated with several accounts, but a contact is the primary on only one account. Contacts can also be associated with numerous opportunities.

If your organization serves mostly individual consumers, or if you are answering inbound calls related to a marketing campaign, then use the Contacts screen when answering inbound calls. If your organization serves mostly businesses, then use the Accounts screen when answering general inbound phone calls.

This chapter describes how sales professionals can use the Contacts screen to record information about individuals who interact with their company.

## **Scenario for Managing Contacts**

This topic gives one example of how contact management might be used. You might use contact management differently, depending on your business model.

In the course of a business day, a sales representative interacts with other professionals. These formal and informal exchanges can result in potential leads or sales opportunities.

A sales representative determines if her company has done business with a particular company by reviewing account and contact records. In cases where contacts are not listed, the sales representative creates new contact records in the Siebel Sales application, and associates the contacts with new or existing accounts.

If the possibility of doing business (an opportunity) arises, then the sales representative creates the opportunity and associates activities and contacts with the opportunity to help her track important milestones for obtaining and closing deals.

## Adding a Contact

When a sales representative identifies an individual as a possible source for leads, that individual's information is added to Siebel Sales as a contact. Team members can access this contact information while they are working on potential business opportunities.

A contact team is a group of employees or partners who can view the contact information in the My Contacts view. If you work in a Mobile Web Client environment and are a member of the contact team, then the contact information is downloaded to your local database the next time you synchronize.

Use the following procedure to create a contact record.

### To add a contact

- 1 Navigate to the Contacts screen, then the Contacts List view.

A contact record appears on the My Contacts view only if you are on the contact team for the contact.

- 2 In the Contacts List, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field            | Comments                                                                                                                                                                                                                          |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Name        | Type the contact's last name.                                                                                                                                                                                                     |
| First Name       | Type the contact's first name.                                                                                                                                                                                                    |
| Account          | Select the account with which the contact is associated.                                                                                                                                                                          |
| Contact Method   | Select the contact's preferred method of interaction. Default values include Email, Fax, Pager, and Phone.                                                                                                                        |
| Job Title        | Type the contact's professional title.                                                                                                                                                                                            |
| Household Status | Displays the status of the household to which the contact is affiliated.                                                                                                                                                          |
| Organization     | Select the organizations for the contact. You can associate multiple organizations with a contact, but your organization is the default organization. Your system administrator sets up organizations in your Siebel application. |
| Middle Initial   | Type the contact's middle initial.                                                                                                                                                                                                |

| Field             | Comments                                                                                                        |
|-------------------|-----------------------------------------------------------------------------------------------------------------|
| Manager Last Name | Select the manager's last name. This field must have a value before you can perform an organizational analysis. |
| Account Status    | Displays the status of the account with which the contact is associated.                                        |

- 3** Drill down on the Last Name field of the record, and navigate the More Info view to complete more fields.

Some fields are described in the following table.

| Field               | Comments                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Do Not Call         | Select the check box to indicate to not telephone the contact.                                                                                                                                                                                                                                                                                                                                                      |
| Do Not Email        | Select the check box to indicate to not send email to the contact.                                                                                                                                                                                                                                                                                                                                                  |
| Do Not Mail         | Select the check box to indicate to not send mail to the contact.                                                                                                                                                                                                                                                                                                                                                   |
| Send Email Updates  | Select the check box to indicate that the contact wants to receive email updates about products and services.                                                                                                                                                                                                                                                                                                       |
| Comments            | Type any additional information associated with the contact.                                                                                                                                                                                                                                                                                                                                                        |
| Contact Status      | Select the status of the contact. Examples are Active, Qualified, Marked for Deletion.                                                                                                                                                                                                                                                                                                                              |
| Households          | Select the households with which the contact is affiliated. Households allow you to track and target contact affiliations, and often these contacts share an address. For more information about households, see <a href="#">Chapter 32, "Households."</a>                                                                                                                                                          |
| Contact Team        | Select the employees for the contact team. This field displays a default value that is based on your user ID. After you create a contact, you are automatically listed as the primary team member. You can add individuals to the contact team by selecting them from the employee list. Only a manager or administrator can change the primary contact team member, or can delete the primary contact team member. |
| Global Owner        | Select the name of the team member who is the global account owner. In cases of multinational or global companies, this field designates one main account team member to oversee the account.                                                                                                                                                                                                                       |
| Registration Source | Displays a value for how the contact was registered. For example, the contact might have been registered at a particular marketing event.                                                                                                                                                                                                                                                                           |
| Price List          | Select the price list associated with the contact.                                                                                                                                                                                                                                                                                                                                                                  |
| Disable Cleansing   | Select the check box to not permit data cleansing.                                                                                                                                                                                                                                                                                                                                                                  |
| Sync List           | Select the user IDs of users who synchronize the contact with a personal information manager (PIM) such as Lotus Notes or Microsoft Outlook. This field requires Siebel Server Sync.                                                                                                                                                                                                                                |

| Field           | Comments                                                                                                                               |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Sync            | Displays a check to indicate the user has included the contact record in the user's Sync List. This field requires Siebel Server Sync. |
| Lock Assignment | Select the check box to lock the contact team assignment from reassignment by Siebel Assignment Manager.                               |
| Employee Flag   | Displays a check to indicate that the contact is an employee of your company.                                                          |
| Time Zone       | Select the time zone in which the contact works or lives.                                                                              |

## Promoting a Personal Contact to a Contact

Contact records can be promoted from the My Personal Contacts view to the My Contacts view.

### *To promote a contact from My Personal Contacts to My Contacts*

- 1 Navigate to the Contacts screen, then the Personal Contacts List view.
- 2 In the Contacts list, select the contact for promotion.
- 3 In the Contact form, clear the check box in the Private field.

The Contact record appears in the My Contacts list.

**NOTE:** You cannot designate a contact as Private (My Personal Contacts) from the My Contacts list.

## Creating a Profile for a Contact

A profile consists of information that is collected about a contact. This information can include a contact's expenditure approval, hobbies, education, and the name of the contact's spouse.

### *To create a profile*

- 1 Navigate to the Contacts screen, Contacts List, then the Profile view.
- 2 Query for the contact.
- 3 In the Profile form, complete the necessary fields.

## Adding a Contact to a Synchronization List

A contact can be added to a list for synchronization with a personal information manager (PIM), for example, Microsoft Outlook, using Siebel Server Sync. For more information about synchronizing contacts, see *Siebel Server Sync Guide*.

### **To add a contact to a sync list**

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Contacts list, drill down on the Last Name field of the contact to add to the sync list.
- 3 Navigate to the More Info view.
- 4 In the More Info form, click the cogwheel icon, and select Add to Sync List.

A check mark appears in the Sync check box of the More Info form.

You can also add a contact to a different sync list by selecting the contact in the Sync List field of the More Info form.

## Removing a Contact From a Synchronization List

Complete the following procedure to remove a contact from the sync list.

### **To remove a contact from a sync list**

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Contacts list, drill down on the Last Name field of the contact to remove from the sync list.
- 3 Navigate to the More Info view.
- 4 In the More Info form, click the cogwheel icon, and select Remove from Sync List.

The check mark is removed from the Sync check box in the More Info form.

## Assessing a Contact

You can use assessments to compare contacts with each other, compare them with a model, or to determine the information that is present for a contact. To perform the assessment, you enter values for the assessment attributes, and a composite assessment value for the contact is calculated. For information about how to perform an assessment, see [“Performing an Assessment \(End User\)” on page 214](#).

# Synchronizing Contact Information with External Applications

The Application Services Interface (ASI) feature allows you to synchronize the contact data between a Siebel application and an external application in real time. This feature enables you to maintain consistent contact information across your enterprise, and to eliminate manual entry of data in multiple applications.

If your Siebel administrator has set up real-time contact integration between a Siebel application and another application, then you can use the Update External System command to send new and modified contact information from the Siebel application to the other application in real time. For more information about ASI, see *Siebel Application Services Interface Reference* and [Chapter 26, "Integration Using ASIs."](#)

## ***To synchronize contact information with an external application***

- 1** Navigate to the Contacts screen, then the Contacts List view.
- 2** In the Contacts list, select a contact record.  
To create a new contact record, see ["Adding a Contact" on page 306](#).
- 3** In the Contacts list, click the cogwheel icon, and select Update External System.

# 25 Adobe Forms Integration

This chapter describes how to set up and use Adobe forms integration. It includes the following topics:

- [About Forms Integration on page 311](#)
- [Scenarios for Integrating Adobe Forms on page 312](#)
- [Process of Setting Up Adobe Forms Integration on page 313](#)
- [Preparing for Adobe Forms Integration Setup on page 314](#)
- [Creating the Web Service for Adobe Forms Integration on page 314](#)
- [Configuring the Web Service for Adobe Forms Integration on page 315](#)
- [Enabling Forms Integration for Additional Applets Using Siebel Tools on page 316](#)
- [Creating an Integration Object for Adobe Forms Integration on page 316](#)
- [Generating an XML Schema for Forms Integration on page 317](#)
- [Mapping the XML Schema to the PDF Form Using Adobe Designer on page 318](#)
- [Creating the Form Record Referencing the PDF File on page 319](#)
- [Generating a Form from a Record \(End User\) on page 320](#)

## About Forms Integration

Government agencies generate paper documents for record-keeping purposes when processing applications, such as those for immigration, citizenship, and visas. These documents might include letters to applicants and standardized forms with a precise layout that must be maintained. Forms and letters might be issued on preprinted paper stock, such as with visas. You can use data from Siebel Business Applications to populate these forms and letters.

Siebel Business Applications provide preconfigured Web services-based integration with Adobe Forms Server and Adobe Designer software. This integration uses data captured in Siebel Business Applications to generate PDF forms. For example, users can extract contact data within an application such as Siebel Call Center, and populate the appropriate fields in a standard PDF application form.

The data for the form can come from the primary business component of a record, or any child business components. The available forms are those that are associated with the primary business component. The Siebel application uses a search specification to select a particular record from a child business component. For example, the Siebel application can select the primary contact associated with a case record.

Users can also generate multiple populated PDF forms at one time. The user selects multiple records, then generates the forms. A PDF form is generated for each record, and is added to each record as an attachment. You can then use Adobe Acrobat Reader to open, print, edit, email, and save the document.

Administrators can use drag-and-drop functionality in Adobe Designer to map the data from Siebel Business Applications to fields in an Adobe PDF form. Administrators can also specify the text style (font), size, justification, and word wrapping for each field in the form, or choose to use the default style settings.

In Siebel Business Applications, the Forms Administration view provides a list of forms available in the Siebel application. The available date and expiration date of each form determines the availability of the form to users, and provides version control.

**NOTE:** In outbound forms integration, form fields are populated from the data in Siebel Business Applications. In inbound forms integration, the data in Siebel Business Applications is populated from form fields.

## Scenarios for Integrating Adobe Forms

This topic describes how Adobe forms integration might be used. You might use Adobe forms integration differently, depending on your business model. Users can generate a schema, and then import and map to fields on a PDF using either XSD or XML data. In these scenarios, XML is used to illustrate the examples. This topic includes the following scenarios:

- [“Setting Up Forms Integration” on page 312](#)
- [“Generating a Form from Data in a Siebel Application” on page 312](#)
- [“Generating Multiple Forms” on page 313](#)

### Setting Up Forms Integration

An immigration and citizenship agency administrator generates an XML schema in a Siebel application and maps the XML data to fields in a visa application form. The administrator then creates a form record that agency personnel can select when they process applications for visitor status.

### Generating a Form from Data in a Siebel Application

A client requests written proof of his citizenship. A citizenship clerk locates the record for the client, determines that the client is a citizen, and generates a proof-of-citizenship form. The Siebel application generates the form, and populates the form with data from the record. The clerk can then print the form and mail it, or transmit the form to the client electronically.



## Generating Multiple Forms

A citizenship clerk prepares all the necessary documentation for a citizenship ceremony. Before the ceremony, the clerk prints a new grant-of-citizenship form for each client who is scheduled to attend the ceremony. Each form is printed on an official government document. Each form contains fields for specific information about the client, such as First Name and Last Name, and general information about the event, such as event date, office location, and so on.

The clerk reviews the list of clients scheduled to attend the event, selects the client records, and then chooses the appropriate form to generate. The Siebel application creates the forms and populates the forms with the required data. The clerk reviews the forms, then prints the forms.

# Process of Setting Up Adobe Forms Integration

To set up Adobe forms integration, complete the following tasks:

- 1 Install the required Adobe software. For more information, see [“Preparing for Adobe Forms Integration Setup” on page 314](#).
- 2 Use Siebel Tools to create the Adobe Web service. For more information, see [“Creating the Web Service for Adobe Forms Integration” on page 314](#).
- 3 Configure the Adobe Web service. For more information, see [“Configuring the Web Service for Adobe Forms Integration” on page 315](#).
- 4 (Optional) If forms integration functionality is required for business objects other than those that are preconfigured for Siebel Public Sector, then use Siebel Tools to add Adobe forms integration functionality. For more information, see [“Enabling Forms Integration for Additional Applets Using Siebel Tools” on page 316](#).
- 5 During the design process, use Siebel Tools to create an integration object for the selected business component. For more information, see [“Creating an Integration Object for Adobe Forms Integration” on page 316](#).
- 6 In Siebel Public Sector, a preconfigured integration object named PUB Immigration Contact is provided. For Siebel Business Applications, a Sample Contact integration object is provided. Verify that both objects are active; make sure that the Inactive check box is not selected.
- 7 Generate the XML schema document. For more information, see [“Generating an XML Schema for Forms Integration” on page 317](#).
 

**NOTE:** Administrators can generate a schema, import the XML schema, and then map the schema to fields on a PDF using either XSD or XML data. In this process, XML is used in the procedures.
- 8 In Adobe Designer, import the XML schema, and then map the schema to fields on the PDF form. For more information, see [“Mapping the XML Schema to the PDF Form Using Adobe Designer” on page 318](#).
- 9 In a Siebel application, create a form record that points to the PDF file. For more information, see [“Creating the Form Record Referencing the PDF File” on page 319](#).

# Preparing for Adobe Forms Integration Setup

You must perform the following steps before you can set up and use Adobe forms integration with a Siebel application. After you verify that the tasks are complete, you can begin the forms integration tasks. For more information about Adobe software version requirements for outbound forms integration, 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 Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

## Preparing the Setup for Adobe Forms Integration

Perform the following steps:

### 1 Install Adobe Form Server.

This server deploys high-volume, secure, XML-based forms as Adobe PDF files to any platform. For installation instructions, see the documentation provided with the server. You must install Java 2 SDK, SE, and IBM WebSphere before you install Adobe Forms Server.

### 2 Install Adobe Designer.

This form design tool allows you to create forms that are based on XML. Adobe provides the installation instructions for this application.

### 3 Make sure that your computer can read Adobe documents.

Users view and interact with Adobe forms and other PDF documents in Adobe Acrobat Reader. Siebel Business Applications use Adobe Acrobat Reader to display PDF documents. You might have to install Adobe Acrobat Reader.

For more information about how to install Adobe Acrobat Reader, and how to configure your computer to display PDF documents, see the Adobe Web site.

# Creating the Web Service for Adobe Forms Integration

To create the Web service for Adobe forms integration, use Siebel Tools to perform the steps in the following procedure. For more information, see *Using Siebel Tools*.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

## To create the Web service

### 1 Log in to Siebel Tools as the administrator.

- 2 From the application-level menu, select File, then New Object, and from the New Objects Wizard dialog box, click the EAI tab and select Web Service.
- 3 From the WSDL Import Wizard, perform the following steps:
  - a Select a project.  
For example, select Contact as the project.
  - b Specify the WSDL document file from which to import.  
The WSDL document file is provided by Adobe.  
  
After you specify the WSDL document file, the following field values are automatically populated:  
  
Run-time data file: *path\SiebelIntegration.xml*  
Log file: *path\SiebelIntegration.log*  
  
Do not change the default values.
  - c Click Next, and then click Finish.
- 4 Use Siebel Tools to compile the project.

## Configuring the Web Service for Adobe Forms Integration

Complete the steps in the following procedure to configure the Web service for Adobe forms integration.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

### **To configure the Adobe Web service**

- 1 Navigate to the Administration - Web Services screen, then the Outbound Web Services view.
- 2 From the Outbound Web Services list, click Import.
- 3 From the EAI Web Service Import dialog box click Browse, locate the Adobe Web service created in Siebel Tools (SiebelIntegration.XML) on the network, and then click Import.
- 4 In the Outbound Web Services list, select Adobe Web Service.
- 5 In the Service Ports list, update the address field with the correct IP address for the Adobe Form Server.

For example, the field must show an address similar to the following address:

`http://255.255.255.0:9080/IDPWeb/IDPFormServer`

## Enabling Forms Integration for Additional Applets Using Siebel Tools

By default, Adobe forms integration is enabled on the following applets:

- Contact List
- PUB Immigration Contact List
- PUB Immigration Credentials List
- PUB Immigration Identity List
- PUB Immigration Identity Form
- PUB Immigration Contact Identity Form

You can also generate forms that are based on other business objects, such as opportunities. Administrators can use Siebel Tools to add Adobe forms integration functionality to other applets in Siebel Business Applications. For more information, see *Siebel Tools Online Help* and *Using Siebel Tools*.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

### **To add forms integration functionality to application applets**

- 1** In Siebel Tools, select the applet to which you want to add the forms integration menu option.
- 2** Add a new Applet Method Menu Item to the applet.
- 3** In the Command field, select the Generate Form Command object.

## Creating an Integration Object for Adobe Forms Integration

The following procedure provides information about how to create a new integration object for Adobe forms integration by using Siebel Tools and the source object Contact. For more information about how to create an integration object, see *XML Reference: Siebel Enterprise Application Integration*, *Siebel Tools Online Help*, and *Using Siebel Tools*.

**NOTE:** When you create the Integration Object for forms integration, make sure not to include fields that include a period (.) in the name. Adobe Designer does not support fields with this character.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

### **To create an integration object**

- 1** From the Object Explorer in Siebel Tools, query for the project (for example, Contacts), and then lock the project.
- 2** Select File, then New Object, and from the New Objects Wizard dialog box click the EAI tab and select Integration Object.

- 3 From the Integration Object Builder wizard screen, complete the following steps:
  - a Select a project.  
For example, select Contact as the project.
  - b Specify the source application of the new Integration Object (business service), and then click Next.  
For example, select EAI Siebel Wizard.
- 4 Select the source object for the new Integration Object from the list.  
For example, select Contact.
- 5 Enter a name for the Integration Object.  
For example, name the object Contact\_Form\_Integration. The name must be unique among all of the Integration Objects in Projects.
- 6 Select the appropriate check boxes to activate the components for the Integration Object.  
For example, expand the Contacts object hierarchy, and select the check box for the appropriate item to choose Contact\_Personal Address and Contact\_Opportunity.  
  
**NOTE:** Developers might want to include multiple integration components when the integration object is built, so that the integration object can be reused for many different forms and so that the required maintenance for integration objects is reduced.
- 7 Click Next, and then click Finish.
- 8 Select the integration object, right-click, and select Validate.

## Generating an XML Schema for Forms Integration

Complete the steps in the following procedure to generate the XML schema. For more information, see *XML Reference: Siebel Enterprise Application Integration*.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

### **To generate the schema for the forms integration object**

- 1 From the Object Explorer list in Siebel Tools, select the new integration object, and then click Generate Schema.
- 2 From the Generate XML Schema window, select a Business Service from the list.  
For example, select EAI XML XSD Generator.
- 3 In the Select an envelope type from the list field, select No Envelope.

- 4 In the Choose the file name to save the schema object field, click Browse, select the file to which you want to save, and then click Finish.

You must save the file in a network location that the Siebel application can access at run time.

The XML Schema file, for example Contact\_schema.xml, is generated from user inputs.

## Mapping the XML Schema to the PDF Form Using Adobe Designer

Administrators can map the data schema from a Siebel application to an Adobe PDF template using the drag-and-drop functionality provided with Adobe Designer software. For more information about using Adobe Designer, see the documentation provided with the Adobe application.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

### *To map the schema to the PDF form*

- 1 Start Adobe Designer, and select the PDF file.

For example, start Adobe Designer with a PDF file named, Contact.pdf.

- 2 Select File, then New Data Connection.
- 3 Select the XML Schema option, and click Next.
- 4 Use the XML Schema File field to select the XML schema file.

Select the Embed XML Schema option, then click Finish.

- 5 Click the Data View tab, and expand the node.

For example, expand the Contact node. The schema columns appear under Contact. The columns include child components, which might be selected during mapping.

- 6 In the PDF form, select the target field.
- 7 Drag the data column from the Data View, and drop the column on the placeholder field in the PDF file.

For example, drag and drop Last Name, First Name, Cellular Phone, Home Phone, and so on.

- 8 Save the file.

**NOTE:** You must save the PDF file in a network location that the Siebel application can access at run time.

## Creating the Form Record Referencing the PDF File

Form records must be maintained within Siebel Business Applications so that the forms are available to users. This process allows administrators to add new forms, update forms with newer versions, and deactivate or remove old and obsolete forms.

Only users with administrator privileges can modify or delete form records. Typically, older forms are flagged as inactive rather than deleted.

This task is a step in [“Process of Setting Up Adobe Forms Integration” on page 313](#).

### To create a form record

- 1 Navigate to the Administration - Document screen, then the Forms Integration Administration view.
- 2 In the Forms Integration list, create a new record, and complete the necessary fields.

Some fields with example values are described in the following table.

| Field              | Comments                                                                                                                     | Example            |
|--------------------|------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Name               | Type the name of the form.                                                                                                   | Contacts           |
| Version            | Type the version number of the form.                                                                                         | 1                  |
| Inactive           | Select this check box to make the form inactive.                                                                             | None               |
| Description        | Type a description of the form.                                                                                              | None               |
| Integration Object | Select the source object for the integration object.                                                                         | Contact            |
| Request            | Select this check box to retrieve the document from the server during the next synchronization session. (Siebel Remote only) | None               |
| Update             | Select this check box to automatically update your copy of the file when the original file is updated.                       | None               |
| Business Object    | Displays the business object associated with the integration object you selected.                                            | Contact            |
| File Name          | Select the filename of the PDF form.                                                                                         | Sample_Contact.pdf |
| File Type          | Displays the file type of the PDF form.                                                                                      | PDF                |

| Field                         | Comments                                                                                                                                                                                                                                                                                                                                  | Example                                        |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| Type                          | Select PDF as the file type in which the form is generated.                                                                                                                                                                                                                                                                               | PDF                                            |
| Attachment Business Component | Select the business component with an Attachments view to which you want to attach the generated form.                                                                                                                                                                                                                                    | Contact                                        |
| Forms Adapter                 | Select Forms Integration PDF Adapter Service. Use the Debug Forms Integration PDF Adapter to troubleshoot issues with the Adobe integration.                                                                                                                                                                                              | Forms Integration PDF Adapter Service.         |
| File Adapter                  | Select Forms Integration File Adapter Service.                                                                                                                                                                                                                                                                                            | Forms Integration File Adapter Service         |
| Attachment View               | Select the view to appear after the form is generated.                                                                                                                                                                                                                                                                                    | Contact Attachment view                        |
| Search Specification          | Type a search specification to select particular information from the child business component of the integration object.<br><br>To include information from a Contact account only if the account is active, enter the example value in the Search Specification field, where Contact_Account represents the Integration Component Name. | "[Contact_Account.Account Status] = 'Active' " |

## Generating a Form from a Record (End User)

Users can generate a PDF document that is automatically populated with data from a record in a Siebel application, such as a contact. The PDF file is stored in the Attachments view associated with the record.

### *To generate a form with data from a record*

- 1 Navigate to the Contacts screen, and select the appropriate record.

You can also create a new contact record and verify that the record contains the data necessary to populate the form.

- 2 Click the cogwheel icon in the Contacts list, and select Generate Form.

The Select Form dialog box provides a list of forms associated with the parent business object.



- 3** From the Select Form dialog box, select the appropriate form, and click OK.  
You are automatically navigated to the Attachments view of the record where the PDF file is stored for archival purposes.
- 4** Drill down on the Attachment Name field to open the document in Acrobat Reader.
- 5** Verify that the form is correctly populated with the data.

## **Generating Forms for Multiple Records**

To generate forms from multiple records such as contacts, perform the same procedure as for a single record, except select multiple records.

When you generate multiple forms, consider the complexity of the form and the number to be generated. If the form is relatively simple, then you can typically generate 200 forms at one time without an impact to performance. If the form is complex, then generate the forms in batches of no more than 100 forms. For example, for a Citizenship Ceremony, assess the complexity of the form before you decide whether to generate forms in one procedure or in batches.



# 26 Integration Using ASIs

This chapter includes information about administering iHelp. It includes the following topics:

- [About ASIs on page 323](#)
- [Setting Up Account, Contact, and Household ASIs on page 323](#)
- [ASI Workflow Descriptions on page 326](#)

## About ASIs

ASIs allow you to integrate Siebel Business Applications with other applications in real time. For general information about ASIs, see *Siebel Application Services Interface Reference*.

The Accounts, Contacts, or Households screens use ASIs to exchange data with any external application such as a back-office application. [Table 82](#) lists these ASIs. You must set up these ASIs shipped with your Siebel application before they can be used. This chapter provides the procedures that you must perform to set up these ASIs. Depending on your business needs, you might choose to set up ASIs and activate workflows for some or all of the GUI commands listed in [Table 82](#).

Table 82. ASIs for Accounts, Contacts, and Households

| Screen                         | GUI Command            | Workflow                  | Outbound and Inbound ASI Pairs         |
|--------------------------------|------------------------|---------------------------|----------------------------------------|
| Accounts                       | Update External System | Synchronize Account ASI   | External Account                       |
| Accounts (Credit Profile view) | Refresh                | Get Account ASI           | Siebel Account                         |
| Contacts                       | Update External System | Synchronize Contact ASI   | External Contact<br>Siebel Contact     |
| Households                     | Update External System | Synchronize Household ASI | External Household<br>Siebel Household |

## Setting Up Account, Contact, and Household ASIs

To set up the prebuilt ASIs for Accounts, Contacts, and Households, perform the following tasks:

- 1 [“Setting Up Web Services for Account, Contact, and Household ASIs” on page 324](#)
- 2 [“Activating Workflows for Account, Contact, and Household ASIs” on page 325](#)

Other tasks you might want to perform include:

- **Extending ASIs.** For more information, see *Siebel Application Services Interface Reference*.
- **Deactivating fields in the ASIs.** For more information, see *Siebel Application Services Interface Reference*.
- **Customizing ASI workflows.** For more information, see *Siebel Business Process Framework: Workflow Guide*.

## Setting Up Web Services for Account, Contact, and Household ASIs

To set up the Web services, you must set up both outbound and inbound Web services for the ASIs. The procedures that follow show you the steps required for each ASI.

### Setting Up Outbound Web Services

Complete the following procedure to set up an outbound Web service.

#### To set up an outbound Web service

- 1 Navigate to the Administration - Web Services screen, then the Outbound Web Services view.
- 2 In the Outbound Web Services list, query to display the record with External Account, External Contact, or External Household in the Name field.
- 3 Verify that the fields in the Outbound Web Services list match those in the following table.

| Namespace              | Name                                                                                | Status |
|------------------------|-------------------------------------------------------------------------------------|--------|
| http://siebel.com/asi/ | One of the following:<br>External Account<br>External Contact<br>External Household | Active |

- 4 In the Service Ports list, create a new record, and complete the fields in the following table.

| Field                | Comments                                                          |
|----------------------|-------------------------------------------------------------------|
| Name                 | Type a name for the port.                                         |
| Service Display Name | Select External Account, External Contact, or External Household. |
| Transport            | Select a value from the drop-down list.                           |

| Field   | Comments                                                                                             |
|---------|------------------------------------------------------------------------------------------------------|
| Address | Displays a template address when you select a transport. Edit the address to which to send the data. |
| Binding | Select SOAP_RPC if a SOAP header is expected by the receiving application.                           |

## Setting Up Inbound Web Services

Complete the following procedure to set up an inbound Web service.

### To set up an inbound Web service

- 1 Navigate to the Administration - Web Services screen, then the Inbound Web Services view.
- 2 In the Inbound Web Service list, query to display the record with Siebel Account, Siebel Contact, or Siebel Household in the Name field.
- 3 Verify that the fields in the Inbound Web Services list match those in the following table.

| Namespace              | Name                  | Status |
|------------------------|-----------------------|--------|
| http://siebel.com/asi/ | One of the following: | Active |
|                        | Siebel Account        |        |
|                        | Siebel Contact        |        |
|                        | Siebel Household      |        |

- 4 In the Service Ports list, review the information in the fields for the service port and make any changes required for your Siebel application.
- 5 In the Operations list, review the information and make any changes required for your Siebel application.

## Activating Workflows for Account, Contact, and Household ASIs

The following workflow processes are used for real-time integration of account, contact and household data:

- Synchronize Account ASI
- Get Account ASI
- Synchronize Contact ASI
- Synchronize Household ASI

You must activate these workflows. For information about activating workflows used by Account, Contact, and Household ASIs, see *Siebel Business Process Framework: Workflow Guide*. For a description of these workflows, see [“ASI Workflow Descriptions” on page 326](#).

## ASI Workflow Descriptions

This topic describes the workflow processes that are used to invoke the ASIs for account processes.

It is not necessary to modify these workflows, but you can modify them to suit your business model.

### Synchronize Account ASI

This workflow submits the account information to the outside application to synchronize the information between the current and outside application.

- **Query For Account By ID.** Queries for the account on the current application using the object ID. Returns an account property set containing the account information.
- **External Account Proxy.** Calls the Synchronize method on the outside application, passing in the account property set. This step returns an account property set, which contains any changes the outside application made to the account.
- **Synchronize Account.** Takes the account property set returned by the previous step and synchronizes it with the account in the current application.

### Synchronize Contact ASI

The Synchronize Contact ASI process is essentially the same as the Synchronize Account ASI process, except that contact replaces account.

### Synchronize Household ASI

The Synchronize Household ASI process is essentially the same as the Synchronize Account ASI process, except that household replaces account.

### Get Account ASI

This workflow queries the outside application to retrieve the latest information about the account. It returns the new information and synchronizes the account on the current application.

- **Query Account By ID.** Queries for the account on the current application using the object ID. Returns an account property set containing the account information.
- **Isolate Integration ID.** In the next step, the workflow uses a query by example. Query by example takes the property set and looks for an account with exactly the same values for the fields in the property set. If the account has changed on the outside application, then those values no longer match. The workflow must query by a value that does not change (the integration ID). Isolate Integration Id takes in a property set and removes all the fields, except the integration ID.

- **External Account Proxy.** Using the property set, which has only an integration ID now, this step queries by example on the outside applications. After it finds the account with that integration ID, it returns an account property set containing the account information.
- **Synchronize Account.** Takes the account property set returned by the previous step and synchronizes it with the account in the current application.





# 27 Web Services

This chapter includes information about the Web service that enables you to access the Siebel database from Microsoft Word. It includes the following topics:

- [About the Word Web Service on page 329](#)
- [Seed Data for Word Web Service on page 330](#)
- [Requirements for Connecting Template to Siebel EAI on page 330](#)
- [Process of Configuring Word Web Service on page 331](#)
- [Downloading the Template for the Word Web Service on page 331](#)
- [Connecting the Word Template to Siebel EAI on page 331](#)
- [Process of Using Word Web Service to Perform a Mail Merge on page 332](#)
- [Getting the Data for a Mail Merge from the Siebel Database on page 332](#)
- [Refining Recipients for a Mail Merge on page 333](#)
- [Refining the Message for a Mail Merge on page 334](#)
- [Previewing Messages for a Mail Merge on page 334](#)
- [Printing or Sending Mail Merge Messages on page 335](#)
- [Logging Messages as a Siebel Activity on page 335](#)

## About the Word Web Service

The Word Web service enables you to use the Word mail merge feature directly with your Siebel database. The Word Web service adds a custom toolbar to your documents. You can use the toolbar to perform your mail merge tasks. You can use the Word Web service to perform the following tasks:

- Create a list of mail merge recipients with data from your Siebel database.
- Refine your mail merge message and add fields to represent fields from your Siebel database.
- Preview your mail merge documents with the data fields populated with data from your Siebel database.
- Print or email your mail merge documents directly from Word.
- Log each mail merge event as an activity in your Siebel database.

By default, the following record types are supported:

- Accounts
- Activities
- Contacts

- Opportunities
- Service Requests

For information on supported versions of Microsoft Word, 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 Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

Users must have the macro-security level set to medium or lower to use this Web service.

## Seed Data for Word Web Service

Siebel Business Applications include seed data for the Word Web service. The seed data includes the following items:

- A template file for the service.
- SAF files. These files are generated when you add templates as literature items. These files must be present to enable users to open the templates from the Literature view.

### ***To enable users to open the Web service template from the Literature view***

- Copy the \*.SAF files from \$SIEBEL\_ROOT/temp/SFA into the \$FILESYSTEM directory.

## Downloading the Word Template

Complete the following procedure to download the Word template.

### ***To download the Word template***

- 1 Navigate to the Administration - Document screen, then the Literature view.
- 2 In the Literature list, select the Word template.
- 3 Drill down on the File Name field of the template, then save the file to your computer.

## Requirements for Connecting Template to Siebel EAI

Before you can connect a Word template to the Siebel Enterprise Application Integration (EAI) component, you must make sure that the following conditions are met:

- Siebel Enterprise Server is running.
- Siebel Server or Siebel Gateway Server is running.
- Siebel EAI component group is enabled.

- Siebel Workflow Management component group is enabled.
- The Siebel Application Object Manager for the Siebel application with which you want to use the Word template is running.
- Seed data for inbound Web services is available.
- The Word template is available.

## Process of Configuring Word Web Service

To configure the Word Web service, perform the following tasks:

- 1 ["Downloading the Template for the Word Web Service" on page 331](#)
- 2 ["Connecting the Word Template to Siebel EAI" on page 331](#)

## Downloading the Template for the Word Web Service

The Word document template that is provided as seed data with Siebel Business Applications contains a toolbar and macros that you can use to work with data from your Siebel database in Word. For more information about how to download the Word template, see ["Seed Data for Word Web Service" on page 330](#).

If you want help with customizing a template to your requirements, then contact your Oracle sales representative for Oracle Advanced Customer Services to request assistance.

This task is a step in ["Process of Configuring Word Web Service" on page 331](#).

## Connecting the Word Template to Siebel EAI

Before you can connect a Word template to the Siebel Enterprise Application Integration (EAI) component, you must make sure that particular conditions are met. For more information about these requirements, see ["Requirements for Connecting Template to Siebel EAI" on page 330](#).

This task is a step in ["Process of Configuring Word Web Service" on page 331](#).

### ***To connect the Word template to Siebel EAI***

- 1 In Word, open the document template.
- 2 Select File, then Properties.
- 3 Click the Custom tab.
- 4 Create custom properties with values in the following table.

| Custom Property | Value                                                                                                                                                                                                                                                                                                                                       |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SFAServer       | <i>ServerName/ea_language</i> , where <i>ServerName</i> is the name of your server, and <i>language</i> is the language of the Siebel Application Object Manager.<br><br>Include the DNS name of the server. For example, if your server name is abcdef, and your domain name is corp.xyz.com, then type abcdef.corp.xyz.com in this field. |
| SFAProtocol     | http or https                                                                                                                                                                                                                                                                                                                               |
| SFAPort         | <i>port_number</i> , where <i>port_number</i> is the number of the port you want to use. Typically, this number is 80.                                                                                                                                                                                                                      |

- 5 Save the document template.

## Process of Using Word Web Service to Perform a Mail Merge

To use the Word Web service to perform a mail merge with data from the Siebel database, perform the following tasks:

- 1 [“Getting the Data for a Mail Merge from the Siebel Database” on page 332](#)
- 2 [“Refining Recipients for a Mail Merge” on page 333](#)
- 3 [“Refining the Message for a Mail Merge” on page 334](#)
- 4 [“Previewing Messages for a Mail Merge” on page 334](#)
- 5 [“Printing or Sending Mail Merge Messages” on page 335](#)
- 6 [“Logging Messages as a Siebel Activity” on page 335](#)

**NOTE:** After you log in to the Siebel database in this process, your session might time out. If this timeout occurs, then you must log in again.

## Getting the Data for a Mail Merge from the Siebel Database

You can use the Word Web service to get contact information for a mail merge from your Siebel database. You perform the following actions to create the query to run:

- Select the business component from which you want contact information.
- Specify conditions to apply to the contact records. You can specify up to six conditions.
- Select the fields you require from the contact records. You can specify up to 40 fields.

When you run the query, the output is saved in a local area as the data source for your mail merge.

This task is a step in [“Process of Using Word Web Service to Perform a Mail Merge” on page 332.](#)

### ***To get contact data from the Siebel database***

- 1 In Word, open the document template.
- 2 Click Get Siebel Data, then select the type of information you want to include in mail merge.  
Select one of the following options:
  - Account
  - Contacts
  - Opportunity
  - Service Request

Alternatively, if you have saved contact data previously, then select Use Saved List and select the list you require.
- 3 Enter your Siebel username and password, then click Login.
- 4 Specify any conditions that you want to apply to the data on the Filters tab of the Define List dialog box.
- 5 Click the Fields tab, then use the dialog to specify the fields that you want to include in the report.
- 6 Click OK.

## **Refining Recipients for a Mail Merge**

After you save the contact data, you can review the list of recipients for your mail merge, and make modifications to the list if required.

This task is a step in [“Process of Using Word Web Service to Perform a Mail Merge” on page 332.](#)

### ***To modify recipients***

- 1 Open the Word document to which you added a data source in [“Getting the Data for a Mail Merge from the Siebel Database” on page 332.](#)
- 2 Click Refine Recipients.
- 3 Use the Mail Merge Recipients dialog to make modifications to the list of mail merge recipients.
- 4 Click OK.

The changes to the list of contacts are saved in the data source.

## Refining the Message for a Mail Merge

After you modify the list of contacts for your mail merge, you can modify the message. You can add fields from the data source to the message.

This task is a step in [“Process of Using Word Web Service to Perform a Mail Merge” on page 332](#).

### *To modify the message*

- 1 Open the Word document with which you associated contact data in [“Getting the Data for a Mail Merge from the Siebel Database” on page 332](#).
- 2 To insert a data field from the data source, perform the following steps:
  - a Position the cursor where you want the data field to appear in the message.
  - b Click Refine Message, then select Insert Siebel Field.
  - c Select the field that you want to insert.

The data fields are added to the message as fields, and are not populated with data from the data source yet.

- 3 To insert text from the Word AutoText feature, perform the following steps:
  - a Position the cursor where you want the AutoText item to appear in the message.
  - b Click Refine Message, then select AutoText.
  - c Select the AutoText item that you want to insert.
- 4 Click Save in the toolbar to save the document.

## Previewing Messages for a Mail Merge

After you specify the data fields to include in the mail merge message, you can preview your mail merge messages with the data fields populated with data from the Siebel database.

This task is a step in [“Process of Using Word Web Service to Perform a Mail Merge” on page 332](#).

### *To preview messages*

- 1 Open the Word document to which you added a data source in [“Getting the Data for a Mail Merge from the Siebel Database” on page 332](#).
- 2 Click Preview.
- 3 Click First Record, Last Record, Previous Record, and Next Record to preview your mail merge messages.

## Printing or Sending Mail Merge Messages

After you preview your mail merge messages, you can merge all of the messages to one Word document, send all of the messages to a printer, or send all of the messages as email messages.

This task is a step in [“Process of Using Word Web Service to Perform a Mail Merge” on page 332](#).

### *To print or send messages*

- 1 Open the Word document to which you added a data source in [“Getting the Data for a Mail Merge from the Siebel Database” on page 332](#).
- 2 Click Print or Send Message, and then select one of the menu items described in the following table.

| Menu Item         | Comments                                                                                                                                                                                                                                                            |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Merge to Document | Merges all records from the data source, and adds each merged document into one Word document.                                                                                                                                                                      |
| Merge to Printer  | Merges all records from the data source, and prints each document.                                                                                                                                                                                                  |
| Send as Email     | Merges all records from the data source, and emails each document to an address specified in the data source. Use the Merge to E-mail dialog box to specify the field where the email address is stored in the data source, and other details of the email message. |

## Logging Messages as a Siebel Activity

After you send the mail merge to the contacts in the data source, you might want to log an activity record in your Siebel database to record the activity.

This task is a step in [“Process of Using Word Web Service to Perform a Mail Merge” on page 332](#).

### *To log messages as a Siebel activity*

- 1 Open the Word document to which you added a data source in [“Getting the Data for a Mail Merge from the Siebel Database” on page 332](#).
- 2 Click Log as Siebel Activity.
- 3 In the Log as Siebel Activity dialog box, complete the fields in the following table.

| Field       | Maps to Siebel Activity Field |
|-------------|-------------------------------|
| Date        | Start Date                    |
| Description | Comments                      |
| Priority    | Priority                      |
| Status      | Status                        |

| Field   | Maps to Siebel Activity Field |
|---------|-------------------------------|
| Subject | Description                   |
| Type    | Type                          |

**4** Click Save.

An activity record for the communication event is created in the Siebel database for each recipient or contact. The record contains the message to the recipient or contact, with the merged fields relevant to the recipient or contact.



# 28 Accounts

This chapter covers how to work with accounts in Siebel Business Applications. It includes the following topics:

- [About Accounts on page 337](#)
- [Scenario for Managing Accounts in Siebel Sales on page 337](#)
- [Scenario for Managing Accounts in Siebel Call Center on page 338](#)
- [Creating an Account on page 338](#)
- [Associating a Contact with an Account on page 341](#)
- [Associating an Activity with an Account on page 342](#)
- [Associating an Opportunity with an Account on page 342](#)
- [Assessing an Account on page 343](#)
- [Synchronizing Account Information with External Applications on page 343](#)
- [Viewing Account Credit Profiles on page 343](#)

## About Accounts

An account is a business external to your company. An account represents a current or potential client, a business partner, or a competitor.

In Siebel Business Applications, you work with accounts through the Accounts screen. Sales representatives use the Accounts screen and the associated views as the primary navigation tool for customer interactions. Call center agents use the Accounts screen to record information about companies and other organizations that interact with your company.

If your organization serves mostly businesses, then use the Accounts screen when answering general inbound phone calls. If your organization serves mostly individual consumers, or if you are answering inbound calls related to a marketing campaign, then use the Contacts screen when answering inbound calls.

## Scenario for Managing Accounts in Siebel Sales

This topic gives one example of how account management in Siebel Sales might be used. You might use account management in Siebel Sales differently, depending on your business model.

At a vendor site, a sales representative meets a prospect. After a brief discussion, the sales representative determines that the prospect is interested in learning more about the products and services that the sales representative's company sells. The sales representative sets up a sales call with the prospect.

During the sales call, the sales representative asks numerous questions to determine the account structure of the prospect's business and to decide how best to meet the prospect's needs.

The sales representative learns that the prospect's business has four locations, and that each service is billed through the main office, and each location receives a billing statement.

After the meeting, the sales representative returns to the office and begins creating the account structure for the prospect's business.

## Scenario for Managing Accounts in Siebel Call Center

This topic gives one example of how account management in Siebel Call Center might be used. You might use account management in Siebel Call Center differently, depending on your business model.

The Accounts screen and views often provide the central navigation point to help call center agents research customers and respond to inbound calls. The type of call determines which view is used by the agent in the Siebel application. The following situations provide examples of how the Accounts screen is used:

- The call center agent must see the existing account information, including the products owned by the account, to assist a caller with a service request or to follow up on a service request.
- A caller contacts the call center in response to a sales campaign. Assuming the caller is unknown, the call center agent creates a new account. First, the agent records the account name, address, and other important information. Then, the agent adds a contact or enters other information about the new account. Finally, the agent associates the contact with the campaign that resulted in the call.
- A call center agent wants to enter information about a prospective account. For example, the agent might call a prospective customer to find out if the customer located requested information on the company's Web site, and whether the customer requires any additional information. The agent adds notes that can be used by a sales representative or schedules follow-up activities to help manage the account relationship.

## Creating an Account

After you identify a business relationship, you add an account to your Siebel application. As the business relationship develops, you can update the account to track important details, such as individual contacts, opportunities, and service requests.

Before you add a new account, search the accounts list to make sure that the account does not already exist.

**NOTE:** When a company changes names or merges with another company, you must transfer account names and contacts to the new account name. Contact your implementation team for more information about how to rename an account. For help renaming an account, create a service request (SR) on My Oracle Support.

### To create an account

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 In the Accounts List, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field        | Comments                                                                                                                                                                                                                         |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Name | Type a name that identifies the account.                                                                                                                                                                                         |
| Site         | Type the location of the account.                                                                                                                                                                                                |
| Parent       | Select a parent account if the account is a subsidiary of a larger company.                                                                                                                                                      |
| Status       | Select the account status. Default values include Active, Contract Pending, Gold, and Inactive.                                                                                                                                  |
| Account Type | Select the type of account. Default values include Commercial, Competitor, Consultant, and Customer.                                                                                                                             |
| Account Team | Select the employees assigned to work with this account. If a call center user is not a member of the Account Team, then that user does not receive information about this account during the Mobile Web Client synchronization. |
| Address      | Select or type the first line of account address. This value appears in some Contacts screen views and Account screen views for contacts that are associated with this account.                                                  |
| URL          | Type the Universal Resource Locator (URL) for the account Web site.                                                                                                                                                              |

- 3 Drill down on the Name field of the record, and navigate to the More Info view to complete more fields.

Some fields are described in the following table.

| Field       | Comments                                                                    |
|-------------|-----------------------------------------------------------------------------|
| Industries  | Select the types of business engaged in by the account.                     |
| PO Approved | Select the check box to indicate the Purchase Order (PO) has been approved. |

| Field                   | Comments                                                                                                                                                                                                                                                                         |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PO Auto-Approval Limit  | Type the amount for which a Purchase Order can be automatically approved.                                                                                                                                                                                                        |
| Shipping Information    | Type text for additional shipping details.                                                                                                                                                                                                                                       |
| Shipping Terms          | Select a value for the terms of shipping. Default values include Due, FOB, TBD, and No Charge.                                                                                                                                                                                   |
| Price List              | Select a price list associated with the account. Your application administrator uses criteria your company defines to establish price lists.                                                                                                                                     |
| Organization            | Displays the name of the organization with which the account is associated.                                                                                                                                                                                                      |
| Current Volume          | Type a monetary amount that represents the account's current sales volume.                                                                                                                                                                                                       |
| Potential Volume        | Type a monetary amount that represents the account's potential sales volume.                                                                                                                                                                                                     |
| Synonyms                | Select a synonym for the account.<br><br>Use this field for alternate names for the account. For example, an account record for International Business Machines might have IBM as an entry in the Synonym field. This field assists in querying or in using Siebel Data Quality. |
| Partner                 | Select the check box to indicate the account is a business partner.                                                                                                                                                                                                              |
| Competitor              | Select the check box to indicate the account is a competitor.                                                                                                                                                                                                                    |
| Disable Cleansing       | Select the check box to not permit data cleansing.                                                                                                                                                                                                                               |
| Territories             | Select a sales territories associated with the account.                                                                                                                                                                                                                          |
| Lock Assignment         | Select the check box to lock the sales team assignment from reassignment by Siebel Assignment Manager.                                                                                                                                                                           |
| Assignment Area Code    | Type an area code for the account. This code indicates that a sales representative from the same area code can be assigned to the account.                                                                                                                                       |
| Assignment Country Code | Type a country code for the account. This code indicates that a sales representative from the same country code can be assigned to the account.                                                                                                                                  |
| DUNS#                   | Displays the Data Universal Numbering System (D-U-N-S) numeric serial number for a company. The D-U-N-S number is unique for each company.                                                                                                                                       |
| Parent/HQ DUNS          | Displays the D-U-N-S number for the account's parent account.                                                                                                                                                                                                                    |
| Domestic Ultimate DUNS  | Displays the D-U-N-S number for the domestic ultimate, which is the highest member in the hierarchy for the same business entity within the same country. A case can be its own domestic ultimate.                                                                               |

| Field                | Comments                                                                                                                                                                                                          |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Global Ultimate DUNS | Displays the D-U-N-S number for the global ultimate, which is the highest member in the hierarchy for the same business entity worldwide.                                                                         |
| Reference            | Select the check box to indicate the account offers a reference for your company's products or services.                                                                                                          |
| Reference Stage      | Select a value for the account stage according to your sales or other methodology. Default values include Project Planning and Strategy, Analysis and Design, Testing and Production Pilot, Rollout, and On Hold. |
| Referenceable as of  | Select the date that the account first became a reference.                                                                                                                                                        |

**4** Navigate to other views to complete more fields.

Some fields are described in the following table.

| Field              | Comments                                                                                                                                                                                            |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Address Line 2     | Type the second line of account address. This value appears in some Contacts screen views and Account screen views for contacts that are associated with this account.                              |
| Expertise          | Select the area of expertise for the account. Default values include Technology, Quality Control, and Client Management.                                                                            |
| Global Owner       | Displays the user ID of the team member who is the global account owner. In cases of multi-national or global companies, this field designates one main account team member to oversee the account. |
| Inventory Location | Type the physical location of the inventory.                                                                                                                                                        |
| Location Type      | Select the type of facility operated by the account at the specified site.                                                                                                                          |
| Parent Site        | Displays the location of the company of which the account is a subsidiary.                                                                                                                          |

## Associating a Contact with an Account

As you work with a prospective account, you develop business relationships with the contacts associated with an account.

Contacts can belong to multiple accounts, and only one account can be the primary account. Deleting a contact record in the Accounts screen's Contacts view only removes the contact's association with the account. The original contact record is still available in the Contacts list.

***To associate a contact with an account***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 In the Accounts list, drill down on the Name field of the account.
- 3 Navigate to the Contacts view.
- 4 In the Contacts list, add an existing contact, select the contact from the Add Contacts dialog box, and click OK.

## Associating an Activity with an Account

An activity is a task or event that is generally, but not always, performed for a contact, an account, or an opportunity. You attend meetings, calls, presentations, and perform other activities associated with an account. You can use the Activities list to enter and track account-related activities. If the activity has a time associated with it, then the activity appears in the Activities list and Calendar.

An account can have numerous activities associated with it. You can associate an activity with an account to track which activities you have completed and track those you want to accomplish in the future as you manage the account relationship.

***To associate an activity with an account***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 In the Accounts list, drill down on the Name field of the account associated with the activity.
- 3 Navigate to the Activities view.
- 4 In the Activities list, create an activity record to associate with the account.

For information about how to add an activity, see [“Creating Activities \(End User\)” on page 193](#).

## Associating an Opportunity with an Account

Accounts are a source of business for your company. An opportunity is a potential revenue-generating event and the opportunity record stores information that you can use to manage accounts.

***To associate an opportunity with an account***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 In the Accounts list, drill down on the Name field of the account.
- 3 Navigate to the Opportunities view.
- 4 In the Opportunities list, create an opportunity record to associate with the account.

For information about how to add an opportunity, see [“Creating an Opportunity” on page 370](#).

## Assessing an Account

You can use assessments to compare accounts with each other, compare them with a model, or to determine the information that is present or not present for an account. To perform the assessment, you enter values for the assessment attributes. The Siebel application calculates a composite assessment value for the account. For information about how to perform an assessment, see [“Performing an Assessment \(End User\)” on page 214](#).

## Synchronizing Account Information with External Applications

The Application Services Interface (ASI) feature allows you to synchronize the account data between a Siebel application and an external application in real time. This feature enables you to maintain consistent account information across your enterprise, and to eliminate manual entry of data in multiple applications.

If your Siebel administrator has set up real-time account integration between a Siebel application and another application, then you can use the Update External System command to send new and modified account information from the Siebel application to the other application in real time. For more information about ASI, see *Siebel Application Services Interface Reference* and [Chapter 26, “Integration Using ASIs.”](#)

If an account has associated contacts, then you must synchronize the contacts with the external application separately. For more information, see [“Synchronizing Contact Information with External Applications” on page 310](#).

### ***To synchronize account information with an external application***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 In the Accounts list, select an account record.  
To create a new account record, see [“Creating an Account” on page 338](#).
- 3 In the Accounts list, click the cogwheel icon, and select Update External System.

## Viewing Account Credit Profiles

If your organization uses a back-office application or another external credit management application to store customer credit information, then you can use the Credit Profile read-only view to get the most current account credit profile information.

The Accounts screen's Credit Profile view allows you to improve employee productivity by providing visibility to complete customer information within your Siebel application, and streamlines the quote-to-cash process by allowing the sales professional to identify potential credit problems early.

This procedure assumes that your Siebel administrator has completed the work necessary to allow real-time account integration through Application Service Interfaces (ASI). For information about how to set up the Web services administration to communicate with the external application, ASI structures, configuring and customizing the ASI, see *Application Services Interface Reference* and [Chapter 26, "Integration Using ASIs."](#)

### **To view account credit profile information**

- 1** Navigate to the Accounts screen, then the Accounts List view.
- 2** Query the Account Name field for the account with the credit profile that you want to view.
- 3** In the Accounts list, drill down on the Name field of the account.
- 4** Navigate to the Credit Profile view.

The Credit Profile form appears and includes information about credit status, risk category, credit limit, and so on. Fields in this form are read-only, except for the Skip Credit Check and Credit Auto Approval Limit fields. For more information about how to use these fields, see *Siebel Order Management Guide*.

- 5** Click Refresh to update the information in the Credit Profile form.



# 29 Global Accounts

This chapter describes the administration and management tasks associated with Siebel Global Accounts. It includes the following topics:

- [About Global Accounts on page 345](#)
- [Scenario for Using and Administering Global Accounts on page 346](#)
- [Process of Using and Administering Global Accounts on page 347](#)
- [Generating a Default Hierarchy on page 347](#)
- [Creating a Custom Hierarchy on page 349](#)
- [Assigning a Custom Hierarchy to an Organization on page 350](#)
- [Updating a Custom Hierarchy on page 351](#)
- [Updating a Custom Hierarchy by Processing Deleted Records on page 352](#)
- [Configuring Error Log Files for Hierarchy Changes on page 353](#)
- [Adding Business Objects to the Global Accounts Hierarchy View on page 354](#)
- [Viewing Global Accounts \(End User\) on page 357](#)

## About Global Accounts

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

Global Account hierarchies are not provided preconfigured with your Siebel application. They must be set up by an administrator. The administrators can set up the following kinds of account hierarchies:

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

## Scenario for Using and Administering Global Accounts

This topic gives one example of how global accounts might be used. You might use global accounts differently, depending on your business model.

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

The sales organization uses the default hierarchy, which is based on the Parent account field. For various reasons, the financial organization requires a modified version of the account hierarchy. One of these reasons is that some accounts' billing structures are different from the accounts' purchasing structures. For example, in the case of XYZ Inc., the following four XYZ accounts are customers of Corp 123: the XYZ Holding company, two regional subsidiaries, and a financial company. The 123 sales organization wants to view the account hierarchy where all accounts report to the parent holding company. Because all account billing for the XYZ companies is funneled through XYZ Financial, Corp 123's financial organization wants to view the account hierarchy where all accounts report to the XYZ Financial. [Figure 8](#) shows the two hierarchies.

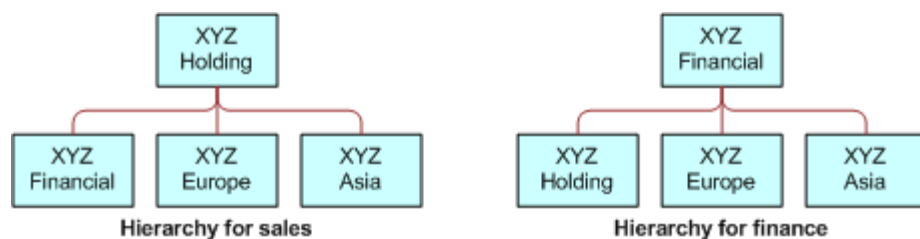


Figure 8. Examples of Account Hierarchies

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

The global accounts manager wants to review all opportunities at Corp 123. The global accounts manager navigates to the Accounts screen, and then the Global Accounts view. In this view, the manager can see the opportunities for Corp 123.

The global accounts manager can use the Enterprise Selling process (ESP) module to develop global account strategies. For information about how to use ESP with global accounts, see [Chapter 37, "Enterprise Selling Process."](#)

# Process of Using and Administering Global Accounts

To use and administer global accounts, perform the following tasks:

- 1 "Generating a Default Hierarchy" on page 347
- 2 "Creating a Custom Hierarchy" on page 349
- 3 "Assigning a Custom Hierarchy to an Organization" on page 350
- 4 "Updating a Custom Hierarchy" on page 351
- 5 "Updating a Custom Hierarchy by Processing Deleted Records" on page 352
- 6 "Configuring Error Log Files for Hierarchy Changes" on page 353
- 7 "Adding Business Objects to the Global Accounts Hierarchy View" on page 354
- 8 "Viewing Global Accounts (End User)" on page 357

## Generating a Default Hierarchy

Follow this procedure to set up a default hierarchy. After generated, this default hierarchy is automatically assigned to organizations without an account hierarchy. To change the account hierarchy assigned to an organization, see ["Assigning a Custom Hierarchy to an Organization" on page 350](#).

**NOTE:** Use the Generate Hierarchy function for hierarchy structures only with a small number of accounts, preferably fewer than 100,000.

This task is a step in ["Process of Using and Administering Global Accounts" on page 347](#).

### *To create a default hierarchy*

- 1 Navigate to the Accounts screen, then the Global Accounts Administration view.

- 2 In the Account Hierarchy list, click Generate Hierarchy.

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

A new account hierarchy is created. You can see error log data after you click Generate Hierarchy if an administrator configures this error log file. For more information, see [“Configuring Error Log Files for Hierarchy Changes” on page 353](#).

Some fields are described in the following table.

| Field   | Comments                                                                                                                                                                                                                                            |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name    | Displays the default name from your user ID and the date.                                                                                                                                                                                           |
| Default | Select the check box to indicate that the account hierarchy is the default. The default hierarchy is assigned to all organizations without an account hierarchy and is updated when new Parent fields on the account records are added or modified. |

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

**NOTE:** If users are using the Siebel application when you generate the account hierarchy, then they must log off and log on again to see the default account hierarchy in the rollup views.

## Adding the Generate Hierarchy Business Service to a Batch Workflow Policy

Complete the following procedure to add the Generate Hierarchy business service to a batch workflow policy.

### To add the Generate Hierarchy business service to a batch workflow policy

- 1 In Siebel Tools, create a workflow policy.
- 2 Configure the workflow policy to call the Generate Hierarchy business service.
- 3 Use the Workflow Process simulator to test that the workflow process works correctly.
- 4 Set the status of the workflow process to Active in the Workflow Deployment View.

For information about how to create and configure a workflow policy, use the Workflow Process Simulator, and set the status of a workflow process, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** If you create the business service in Siebel Tools, and compile the business service into the SRF file, then make sure that you copy the SRF file to the objects\lang directory.

- 5 Execute the workflow policy as a batch component in the Siebel application, as follows:
  - a Navigate to the Administration - Server Management screen, then the Jobs view.
  - b In the Jobs view, create a new job with a Component/Job value of Workflow Process Manager.

- c** In the Job Parameters list, add a parameter for the new job with the details in the following table.

| Field | Comments                                                                     |
|-------|------------------------------------------------------------------------------|
| Name  | Select a value of Workflow Process Name.                                     |
| Value | Type the name of the workflow policy you created in <a href="#">Step 1</a> . |

- d** In the Job Detail form, select the time and date when you want the job to start in the Scheduled Start field.
- e** In the Jobs view, click Submit Job.
- The job automatically starts at the scheduled time, and a Task ID is generated for the job.
- f** To track the execution of the task, select the job with the Task ID that you want to track in the Jobs view, and navigate to the Tasks view.
- You can view the details of the task in the Tasks view and in additional views for the Tasks view.

## Enabling Users to Add Accounts with No Parent to the Default Hierarchy

If your users must add accounts that have no parent account to the default hierarchy, then follow this procedure.

### *To enable users to add accounts with no parent account to the default hierarchy*

- 1 In Siebel Tools, select the Dynamic Hierarchy Direct Relationship business component.
- 2 Set the value of the DynHierarchy LoadAllAccounts user property to Y.
- 3 Select the Account business component, then select the Parent Account Id field.
- 4 Set the value of the ForceActive property for the Parent Account Id field to TRUE.
- 5 Compile the Siebel repository file.
- 6 Copy the Siebel repository file to your Siebel installation.

## Creating a Custom Hierarchy

You can create a custom hierarchy by starting from the beginning and creating a series of new records in the Account Relationships list or by generating a hierarchy. For more information, see [“Generating a Default Hierarchy” on page 347](#).

This task is a step in [“Process of Using and Administering Global Accounts” on page 347](#).

### *To create a custom hierarchy*

- 1 Navigate to the Accounts screen, then the Global Accounts Administration view.

- 2 In the Account hierarchy list, create a new record, and complete the necessary fields.  
Do not check the Default field.
- 3 In the Account Relationships list:
  - a Create new records for each of the top level parent accounts.  
Leave the Parent Account field blank for each of these records.
  - b Create new records for the child accounts, entering values in the Parent Account field for each record.

## Creating a Custom Hierarchy Based on the Default Hierarchy

Complete the following procedure to create a custom hierarchy that is based on the default hierarchy.

### *To create a custom hierarchy based on the default hierarchy*

- 1 Create an account hierarchy.  
For more information, see ["Generating a Default Hierarchy" on page 347](#).
- 2 Select the account hierarchy record, and make sure that the Default field is not selected.
- 3 In the Account Relationships list, edit the Parent Account field for existing accounts, and create new relationship records as required.  
  
Accounts without parent accounts are at the top of the hierarchy and must be entered before their child records can be completed.

# Assigning a Custom Hierarchy to an Organization

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

This task is a step in ["Process of Using and Administering Global Accounts" on page 347](#).

### *To assign a custom hierarchy to an organization*

- 1 Navigate to the Administration - Group screen, then the Organizations view.
- 2 Select the organization with the account hierarchy that you want to change.
- 3 In the form in the lower part of the screen, in the Account Hierarchy field, select the custom hierarchy that you want the organization to use when viewing global accounts.

## Updating a Custom Hierarchy

Custom hierarchies are static and must be updated by the administrator. Update an account hierarchy in the following ways:

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

This task is a step in [“Process of Using and Administering Global Accounts” on page 347](#).

### To update a custom hierarchy

- 1 Navigate to the Accounts screen, then the Global Accounts Administration view.
- 2 Select the account hierarchy record.
- 3 Perform one of the following steps:
  - In the Account Relationships list, edit the Parent Account fields for existing accounts, and create new relationship records as required.
  - In the Account Hierarchy list, click Update Hierarchy to return the hierarchy to the default, and in the Account Relationships list, edit the Parent Account fields for existing accounts, and create new relationship records as required.

You can see error log data after you click Update Hierarchy if an administrator configures this error log file. For more information, see [“Configuring Error Log Files for Hierarchy Changes” on page 353](#).

## Adding the Hierarchy Update Business Service to a Batch Workflow Policy

Complete the following procedure to add the Hierarchy Update business service to a batch workflow policy.

### To add the Hierarchy Update business service to a batch workflow policy

- 1 In Siebel Tools, create a workflow policy.
- 2 Configure the workflow policy to call the Update Hierarchy business service.
- 3 Use the Workflow Process simulator to test that the workflow process functions correctly.
- 4 Set the status of the workflow process to Active in Workflow Deployment View.

For information about how to create and configure a workflow policy, use the Workflow Process Simulator, and set the status of a workflow process, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** If you create the business service in Siebel Tools, and compile the business service into the SRF file, then make sure that you copy the SRF file to the objects\lang directory.

- 5 Execute the workflow policy as a batch component in the Siebel application, as follows:

- a** Navigate to the Administration - Server Management screen, then the Jobs view.
- b** In the Jobs view, create a new job with a Component/Job value of Workflow Process Manager.
- c** In the Job Parameters list, add a parameter for the new job with the details in the following table.

| Field | Comments                                                                     |
|-------|------------------------------------------------------------------------------|
| Name  | Select the value Workflow Process Name.                                      |
| Value | Type the name of the workflow policy you created in <a href="#">Step 1</a> . |

- d** In the Job Detail form, select the time and date when you want the job to start in the Scheduled Start field.
- e** In the Jobs view, click Submit Job.  
The job automatically starts at the scheduled time, and a Task ID is generated for the job.
- f** To track the execution of the task, select the job with the Task ID that you want to track in the Jobs view, and navigate to the Tasks view.  
You can view the details of the task in the Tasks view and in additional views for the Tasks view.

## Updating a Custom Hierarchy by Processing Deleted Records

When you perform the update hierarchy procedure, the records that are deleted using Enterprise Integration Manager (EIM) are not processed. This procedure results in some records not having a parent record. To delete these records, update the custom hierarchy by processing the deleted records.

The Update Hierarchy function uses the new entries in the relationship table S\_DYN\_HRCHY\_REL to update only the denormalized table S\_DYNHR\_RPT\_REL. This function does not affect the user interface; the function affects only the data processing.

Before updating the hierarchy with deleted records, configure the Update with Deletion button in Siebel Tools. For information about configuring a button control, see *Configuring Siebel Business Applications*.

This task is a step in ["Process of Using and Administering Global Accounts"](#) on page 347.

### To configure the Update with Deletion button

- 1** In Siebel Tools, click Applet in the Object Explorer, select Dynamic Hierarchy Admin List Applet, and then lock the object so that you can change it.



- 2 In the Object Explorer, navigate to the Applet, then create a control with the following properties:  
 Name = Update Hierarchy With Deletion Button  
 Caption = Update Hierarchy With Deletion  
 HTML Type = MiniButton  
 Method Invoked = UpdateHierarchyWithDeletion
- 3 Right-click the applet and select Edit Web Layout.  
 The Web Layout Editor displays.
- 4 Change the template mode in the Controls/Columns window to Edit List.  
**NOTE:** The Controls/Columns window displays the available controls; including the one you created in [Step 2](#).
- 5 Drag and drop the new button control onto an available location. When you release the mouse, the button displays.
- 6 Click Save and then close the Web Layout Editor.
- 7 Compile the object for your changes into the Siebel Repository File (SRF).
- 8 Unlock the object.
- 9 To view the new object in Siebel CRM, navigate to Accounts, then the Global Accounts Administration view.

## Updating a Custom Hierarchy

Complete the following procedure to update a custom hierarchy.

### *To update a custom hierarchy*

- 1 Navigate to the Accounts screen, then the Global Accounts Administration view.
- 2 Select the account relationships record that you want to update.
- 3 Click Update Hierarchy with Deletion.

You can see error log data after you click Update Hierarchy with Deletion if an administrator configures this error log file. For more information, see ["Configuring Error Log Files for Hierarchy Changes" on page 353](#).

# Configuring Error Log Files for Hierarchy Changes

A user can see error log data after clicking the Generate Hierarchy button, the Update Hierarchy button, and the Update Hierarchy with Deletion button if an administrator configures error log files for these hierarchy changes.

This task is a step in ["Process of Using and Administering Global Accounts" on page 347](#).

**To configure error log files for hierarchy changes**

- 1 Navigate to the Administration - Server Configuration screen, then Servers view.
- 2 In the Components view, select the Sales Object Manager (ENU) component.
- 3 In the Events view, change the Log Level field to 5 for the following Event Type records:
  - Generate Hierarchy Event Logging
  - Update Hierarchy Event Logging
  - Update Hierarchy With Deletion Event Logging

## Adding Business Objects to the Global Accounts Hierarchy View

Users often want additional business objects to appear in the hierarchy. The business objects, such as forecasts, revenues, and service requests, already exist. Administrators must configure these business objects for the hierarchy using Siebel Tools. Users then change their preferences to view the objects in their hierarchies.

This task is a step in [“Process of Using and Administering Global Accounts” on page 347](#).

**To add a new node to the hierarchy tree**

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 Query for records in which the Type field is GLOBACC\_USERPREF.
- 3 Create a new record with the field values in the following table.

| Field         | Value                                                       |
|---------------|-------------------------------------------------------------|
| Type          | GLOBACC_USERPREF                                            |
| Display Value | The name of the object (for example, Forecasts or Revenues) |
| Language Name | The language of the object in the tree                      |

**NOTE:** You can verify that you correctly added the new node by navigating to the User Preferences screen, then Global Accounts view. The new node must appear in the list of global account tree objects.

### Configuring the Tree Node

Complete the following procedure to configure the tree node.

**To configure the tree node**

- 1 In Siebel Tools, navigate to Business Component in the Object Explorer, select the business component for the node that you want to add to the tree, lock the project for that business component, and then copy and rename that business component.

For example, copy the Service Request business component and rename the copied business component Global Account Service Request.

- 2 Configure the join, field, and user properties records for the new business component by completing the following steps:

- a Navigate to Business Component, then Join:

- Add a join record with an Alias field of DynHierarchy Visibility Position and a Table field of S\_ACCNT\_POSTN. Select the Outer Join Flag for the new record.
- Add a join record with an Alias field of DynHierarchy Visibility Organization and a Table field of S\_ORG\_BU. Select the Outer Join Flag field the new record.

- b Navigate to Business Component, then Field:

- Add a field record with a Name field of Dynamic Hierarchy ID, a Join field of S\_DYNHR\_RPT\_REL, and a Column field of DYN\_HRCHY\_ID.
- Add a field record with a Name field of DynHierarchy Visibility Position ID, a Join field of DynHierarchy Visibility Position, and a Column field of POSITION\_ID.
- Add a field record with a Name field of DynHierarchy Visibility Organization ID, a Join field of DynHierarchy Visibility Organization, and a Column field of BU\_ID.

- c Navigate to Business Component, then Business Component User Prop:

- Add a user property record with a Name field of DynHierarchy Hierarchy ID Field and a Value field of DynHierarchy Hierarchy ID.
- Add a user property record with a Name field of DynHierarchy Visibility Position ID Field and a Value field of DynHierarchy Visibility Position ID.
- Add a user property record with a Name field of DynHierarchy Visibility Organization ID Field and a Value field of DynHierarchy Visibility Organization ID.

**NOTE:** You can model the join, field, and user properties records of the new business component after comparable records in the Global Account Opportunity business component.

- 3 Navigate to Link, select the Global Account/Opportunity link, lock the project for that link, and then copy and rename that link 3 times as follows:

- a For the first copy, change the Name field to Global Account/name of the business component that you copied in [Step 1](#), and select this business component name in the Child Business Component field.

For example, change the Name field to Global Account/Service Request, and select Service Request in the Child Business Component field.

- b** For the second copy, change the Name field to Global Account/the name of the business component that you created in [Step 1](#) (Hierarchy Denorm), and select this business component in the Child Business Component field.

For example, change the Name field to Global Account/Global Account Service Request (Hierarchy Denorm), and select Global Account Service Request in the Child Business Component field.

- c** For the third copy, change the Name field to Global Account/the name of the business component that you created in [Step 1](#), and select this business component name in the Child Business Component field.

For example, change the Name field to Global Account/Global Account Service Request, and select Global Account Service Request in the Child Business Component field.

- 4** Navigate to Business Object, select the Global Account Hierarchy business object, navigate to Business Object, then Business Object Component:

- a** Add a business object component record with a Bus Comp field of the name of the business component that you copied in [Step 1](#) and a Link field of the link that you created in [Step 3](#) part a.

For example, add a business component record with a Bus Comp field of Service Request and a Link field of Global Account/Service Request.

- b** Add a business object component record with a Bus Comp field of the name of the business component that you created in [Step 1](#) and a Link field of the link that you created in [Step 3](#) part b.

For example, add a business component record with a Bus Comp field of Global Account Service Request and a Link field of Global Account/Global Account Service Request (Hierarchy Denorm).

- 5** Create in UI objects, such as applets, views, and screen views, and then add those objects to the Siebel application.

For more information, see *Configuring Siebel Business Applications*.

- 6** Navigate to Applet, select the Global Accounts Hierarchy Tree Applet, navigate to Applet, Tree, and then Tree Node, select the Opportunity Node, and then copy and rename that node.

For example, rename the copied node Service Requests Node.

- 7** Configure the new node:

- a** In the Applet field, select the list applet for the name of the business component that you created in [Step 1](#).

- b** In the Business Component field, select the name of the business component that you created in [Step 1](#).

- c** In the Display Name field, change the display name for the node.

**NOTE:** The display name must be the same as the LOV name for the node.

- d** In the HTML Closed Bitmap field and the HTML Open Bitmap field, select the appropriate values.

- e** In the Label Field field, select a label for the node.

- f** In the Position field, enter the next available position for the node.

- 8 Compile the objects for your changes into the Siebel Repository File (SRF).
- 9 Unlock the objects.

## Verifying the New Node

Complete the following procedure to verify the new node.

### *To verify the new node*

- 1 Navigate to the User Preferences screen, then the Global Accounts view.
- 2 If necessary, deselect the Hide column for the new object.
- 3 Navigate to the Accounts screen, then the Global Accounts Hierarchy view to see the new tree node.

## Viewing Global Accounts (End User)

Available as an option, Global Accounts allow users to see (but not change) opportunities, activities, contacts, and account team information for an account and its subsidiary accounts.

Global Accounts consist of a parent account, the child accounts, the child accounts' children, and so on. These hierarchies are determined in one of the following ways:

- Hierarchies are determined by the value in the parent field on the Account Record.
- Hierarchies are determined by the administrator who creates custom hierarchies.

Global Accounts are created and maintained by the administrator. If an account has no child account or the administrator has not defined a hierarchy for an account, then a message appears advising you that the selected record is not included as part of your defined hierarchy. For more information about how global-account hierarchies are created, see [“Creating a Custom Hierarchy” on page 349](#).

This task is a step in [“Process of Using and Administering Global Accounts” on page 347](#).

### *To view global accounts information*

- 1 Navigate to the Accounts screen, then the Global Accounts Hierarchy List view.
- 2 From the visibility filter, select My Global Accounts.

Other visibility filter options include All Global Accounts, and All Global Accounts Across Organizations.

Below the listing of the global accounts, the explorer on the left shows the hierarchy of the account, subaccounts, contacts, opportunities, activities, and account team, and the list on the right shows the associated records.

**NOTE:** Navigate to the User Preferences screen, then the Global Accounts view, to hide objects or make visible additional objects, such as service requests, quotes, orders, and assets.

## **Accounts in the Global Accounts Hierarchy List View**

Different accounts appear in the Global Accounts Hierarchy List view because Siebel Business Applications use different SQL code to generate the Global Accounts Hierarchy List view, depending on whether you define a hierarchy.

If you define a global account hierarchy, then the Global Accounts Hierarchy List view displays that hierarchy. If you define a hierarchy and use EIM to import records, then the accounts do not appear in the Global Accounts Hierarchy List view unless you update the global account hierarchy. To update the global account hierarchy, select the account hierarchy record, then click Update Hierarchy.

If you do not define a global accounts hierarchy, then the Global Accounts Hierarchy List view uses the Parent fields of the accounts to display the account hierarchy. If you do not define a hierarchy and use EIM to import records, then the Global Accounts Hierarchy List view uses the Parent fields of the accounts to display the accounts.

# 30 Opportunity Workflows

This chapter covers setting up and managing opportunity workflows. It includes the following topics:

- [About Opportunity Workflows on page 359](#)
- [Setting Up Opportunity Notification Workflows on page 360](#)
- [Activating the Opportunity Notification Workflow Processes and Policies on page 361](#)
- [Rerouting an Opportunity Using Workflows on page 362](#)
- [Modifying Opportunity Workflows on page 363](#)
- [Setting Up the Get Manager Email on page 364](#)

## About Opportunity Workflows

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

Opportunity workflows allow managers to manage opportunities by tracking potential high-income opportunities, informing managers about sales teams actions regarding an opportunity, and notifying sales team when an opportunity meets a set of criteria.

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

The seven predefined opportunity workflows are:

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

You can use Siebel Audit Trail to track the changes that have been made to the opportunity records. For information about configuring, implementing, testing, and monitoring workflows, see *Siebel Business Process Framework: Workflow Guide*. For more information about how to audit opportunities, see [Chapter 6, “Siebel Audit Trail.”](#)

## Setting Up Opportunity Notification Workflows

Follow these steps to correctly set up the opportunity workflows:

- In Siebel Tools, revise all Siebel workflows so that they are editable and have a status of *In Progress*. All Siebel workflows are initially inactive and cannot be edited. Make any necessary changes and activate the workflows. For more information about how to revise Siebel workflows, see *Siebel Business Process Framework: Workflow Guide*.
- Verify that the Workflow Server component and the Communication Manager component are enabled and running. For detailed instructions, 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 Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

- Create an Opportunity Notification Profile communications profile for the Internet SMTP/POP3 Server driver. Enter the appropriate values in the From Address and in the SMTP Server parameter overrides for the profile. For more information about implementing and configuring outbound communications integrations for your Siebel Business Applications, including creating profiles for the Internet SMTP/POP3 Server driver, see *Siebel Email Administration Guide*.
- Set up and activate the workflows and policies.
  - Activate the opportunity workflow processes. For more information, see [“Activating the Opportunity Notification Workflow Processes and Policies” on page 361.](#)
  - Modify Opportunity workflows, as necessary. For more information, see [“Modifying Opportunity Workflows” on page 363.](#)
  - Set up the Create Reroute Oppty Activity. For more information, see [“Rerouting an Opportunity Using Workflows” on page 362.](#)
  - Set up the Get Manager Email. For more information, see [“Setting Up the Get Manager Email” on page 364.](#)
- Load the run-time events for the emails. For more information about run-time events, see *Siebel Business Process Framework: Workflow Guide*.
- Generate the triggers. For more information about how to generate triggers, see *Siebel Business Process Framework: Workflow Guide*.
- Run the workflow monitoring agent. For more information about the workflow monitoring agent, see *Siebel Business Process Framework: Workflow Guide*.



## Activating the Opportunity Notification Workflow Processes and Policies

There are five different workflow processes that generate automatic emails. All of these processes must have the communication profile specified.

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

The following procedure sets up this automatic notification process. For general instructions on how to set up workflows, see *Siebel Business Process Framework: Workflow Guide*.

### **To set up the opportunity workflows**

- For each of these workflows, make sure to:
  - Revise the workflow.
  - Set the Communication Profile to Opportunity Notification Profile.
  - Activate the workflow.
  - Clear the Expiration field.

### **Opportunity Assigned Notification Process**

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

### **Opportunity Inactive Notification Process**

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

The default time lapse between when the lead is accepted (or last worked on) and when the email is delivered is 30 days. To modify this default value, edit the Duration Days property for the workflow in Siebel Tools.

**NOTE:** In the preconfigured application, reassignment of leads is manually executed. You might want to create a workflow that automatically reassigns the lead to a sales manager or administrator after a specified amount of time.

### Opportunity Pending Notification Process

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

#### *To modify the time lapse between lead assignment and email delivery*

- 1 Navigate to the Administration - Business Process screen, then the Workflow Policies view.
- 2 Query for the Email Notification of Pending Oppty policy.
- 3 Verify that this policy is activated, and modify the Duration and Units fields.
- 4 Activate the workflow, and run the Workflow Monitor Agent.

For more information, see *Siebel Business Process Framework: Workflow Guide*.

### Opportunity Lost Notification Process

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

### Opportunity Won Notification Process

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

## Rerouting an Opportunity Using Workflows

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

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

***To set up the opportunity reroute activity***

- Revise the Create Rerouted Oppty Activity workflow process.

Replace the value of the Default String field in the Sales Operator Login record with the username of the sales operator to receive the activity. Remember that the username is case-sensitive.

## Modifying Opportunity Workflows

An administrator can modify the opportunity workflows. The administrator can make the following changes:

- Modify the text of the email.
- Change the notification time.
- Set the lead notification restrictions.
- Add other Siebel fields.

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

***To modify the text of an opportunity workflow email***

- In the Send Out Emails step of the workflow, edit the value of the Message Body input argument.

The text includes field placeholders for data from the opportunity record. These placeholders appear as follows:

“+[Placeholder field]+”

## Restricting Conditions for Delivery of Emails

Complete the following procedure to restrict conditions for delivery of emails.

***To restrict conditions for delivery of emails***

- 1 Navigate to the Administration - Business Process screen, then the Workflow Policies view.
- 2 Select one of the following email notification policies:
  - Email Notification of Assigned Oppty
  - Email Notification of Inactive Oppty
  - Email Notification of Lost Oppty
  - Email Notification of Pending Oppty
  - Email Notification of Won Oppty
- 3 In the Conditions list, select a condition, or create a new condition.

- 4 Change the values in the Operation and Value fields to modify the condition.

For example, to send email notifications for leads that have a high lead quality, create the record in the following table.

| Field           | Value                    |
|-----------------|--------------------------|
| Condition Field | Opportunity Lead Quality |
| Operation       | =                        |
| Value           | 1-excellent              |

## Stop Sending Email Notifications to a Sales Representative's Manager

Complete the following procedure to stop sending email notifications to a sales representative's manager.

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

- Edit the workflow so that there is a single connector between Start and End.

Delete all other arrows.

## Setting Up the Get Manager Email

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

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

# 31 Opportunities (End User)

This chapter describes how users use opportunities. It includes the following topics:

- [About Opportunities on page 365](#)
- [Scenarios for Managing Opportunities on page 366](#)
- [About Opportunities Lead Assignment on page 367](#)
- [About Lead Response on page 368](#)
- [About Lead Qualification, Sales Methods, and Stages on page 368](#)
- [Process of Managing Opportunities on page 369](#)
- [Creating an Opportunity on page 370](#)
- [Changing the Primary Sales Team Member on page 373](#)
- [Monitoring Significant Opportunity Transactions on page 374](#)
- [Assessing an Opportunity on page 374](#)
- [Viewing Decision Issues for an Opportunity on page 374](#)
- [Associating a Contact with an Opportunity on page 375](#)
- [Managing Activities Associated with an Opportunity on page 375](#)
- [Associating a Product with an Opportunity on page 375](#)
- [Creating a Quote from an Opportunity on page 376](#)
- [Creating an Organization Analysis on page 378](#)
- [Viewing Opportunity Charts on page 380](#)
- [Setting Up Lead Sources for Opportunities on page 382](#)

## About Opportunities

An opportunity is defined as a potential revenue-generating event. Opportunity-related information is recorded and tracked in the views associated with the Opportunities screen. This chapter describes how sales professionals can use the Opportunities screen to perform the following tasks:

- Receive and respond to new leads that are assigned to you.
- Create new opportunities and enter related information such as accounts, contacts, activities, and products.
- View, qualify, and update opportunities assigned to you and your sales team (if you are a manager).
- Track the status of an opportunity through the sales cycle from creation to closure.

- Share information about the opportunity with sales team members.
- Generate quotes, presentations, and other types of information needed to close the deal.

## Scenarios for Managing Opportunities

This topic describes how opportunity management might be used. You might use opportunity management differently, depending on your business model. This topic includes the following scenarios:

- [“Converting Opportunities to Leads” on page 366](#)
- [“Tracking Opportunities” on page 366](#)
- [“Generating Quotes for Opportunities” on page 367](#)

### Converting Opportunities to Leads

A company uses Siebel Marketing to develop a campaign as part of a new product introduction. During the campaign, a telemarketing agent uses Siebel Call Center to contact prospects associated with the campaign. During her conversations with prospects, the agent qualifies leads by determining whether each prospect is interested in the new product offering. When a prospect expresses interest in learning more about the new product, the agent creates a new lead.

Using Siebel Assignment Manager, the lead is automatically routed to the sales representative who is most qualified to work on the lead and whose schedule can accommodate the new assignment.

When the sales representative logs in to the Siebel Sales application, she sees the new lead in the Opportunities list on her home page. Drilling down on the lead takes the sales representative to the Opportunities screen. After reviewing details about the lead, such as the customer information, probability of closing, and the products that the customer is interested in purchasing, the sales representative decides to accept the lead by changing the Status field to Accept.

After the sales representative accepts the lead, she begins to work on the lead by assembling members of the sales team, conducting further research on the customer and its requirements, coordinating and recording activities, uploading agreements, and generating proposals and presentations for the customer. As the sales representative works through the sales cycle, she updates information about the sales stage, and keeps private notes and notes that she shares with other members of the sales team. Eventually, the sales representative develops a quote from the Opportunities screen. When the customer accepts the quote, it is converted into an order.

**NOTE:** Siebel Marketing, Siebel Call Center, Siebel Sales, and Siebel Quotes are fully integrated, separately licensed product offerings. You must license these products to access the views.

### Tracking Opportunities

At a trade show, a sales representative meets a prospective customer who might be a lead for a new business opportunity. When the sales representative returns to the office, he discovers the company is listed in Siebel Sales as an account, but the person he met is not listed as a contact.

The sales representative proceeds to add the prospective customer as a contact, and then creates the opportunity. He then schedules meetings and creates associated activities, and enters other potential contacts associated with the opportunity.

As the sales process continues, the sales representative gathers and updates information about the account, its contacts, and the opportunity that he is pursuing. As the relationship grows, the sales representative can add, view, and share stored information and key knowledge with other members of the sales team.

## Generating Quotes for Opportunities

A sales representative is assigned to the sales team for an opportunity. As the sales representative gathers product information about the customer requirements, she enters that information in the Siebel Sales application. After she presents to the customer, the customer indicates that the representative's company is on the short list for the deal, and that the representative can submit a quote.

The sales representative automatically creates a quote. The quote is based on the information she has already entered into the Siebel Sales application. After she generates the quote, she synchronizes the quote information with the revenues associated with the opportunity. By making sure these numbers are in sync, the sales representative establishes that the data associated with her opportunity is current and that her forecasts are accurate.

## About Opportunities Lead Assignment

As a sales representative, you can view new leads in the Opportunities list on your home page, or you can navigate to the Opportunities screen to view new leads that you did not create but were assigned to you. A lead might be assigned to you in the following ways:

- A lead is generated through a campaign and automatically routed using Siebel Assignment Manager and predefined rules.
- A lead is entered into the Siebel application by an administrator and automatically routed using Siebel Assignment Manager and predefined rules.
- An opportunity is created by a sales manager or sales representative who adds you to the sales team.

In each of these cases, you are able to view the lead or opportunity because you have been added to the sales team, either as the primary on the sales team or as a sales team member. If you are receiving a lead for the first time and you are the primary on the sales team, then the Status field in the More Info view is set to Pending by default. You can accept, reject, or reroute the lead by changing the value in the Status field.

If the administrator has activated the email notifications, and has enabled predefined processes, then these processes can send email messages to you to alert you of the following events:

- You have received a new lead and must accept, reject, or reroute the lead within seven days.
- You received a new lead five days ago and must accept, reject, or reroute the lead within two days.

- You have accepted a lead but have not worked on the lead in 30 days.
- You have won the sales opportunity and can enter the reason in the Siebel application.
- You have lost the sales opportunity and can enter the reason in the Siebel application.

The wording of the emails and the wait periods can be modified. Opportunity Workflows sends email only if the opportunity has revenue greater than \$50,000. For more information, see [Chapter 30, "Opportunity Workflows."](#)

## About Lead Response

After you, as a sales representative, receive a lead, you can choose to accept, reject, or reroute the lead.

- **Rejecting the Lead.** You can reject a lead by changing the Status field to Reject in the More Info view. Enter the reason for rejecting the lead in the Reason field. The lead remains in your queue until it is reassigned by your manager.
- **Rerouting the Lead.** If you decide to reroute a lead by changing the Status field in the More Info form to Reroute, then a Reroute activity is automatically created. Enter the reason for rerouting the lead in the Reason field. The lead remains in your queue until it is rerouted by your manager.
- **Accepting the Lead.** You can accept a lead by changing the Status field in the More Info form to Accept. Enter the reason for accepting the lead in the Reason field.

## About Lead Qualification, Sales Methods, and Stages

When you, as a sales representative, accept a lead, you can begin to work on the lead in the Opportunities screen. The records in the Opportunities list include both leads and opportunities. Leads are defined as opportunities that have not yet been qualified.

Lead qualification status is indicated in the Sales Stage field. The list of values in the Sales Stage field varies depending on which sales method you are using.

A sales method is a formalized approach or methodology used during the sales process. A sales method can encompass all activities associated with the sales process, from prospecting to forecasting to closing deals. This approach allows sales representatives to use the method most appropriate for their opportunities.

The application administrator establishes values in your Siebel application that represent the sales methods and sales stages for your company. It is a recommended business practice to designate a default sales method in your Siebel application. This practice allows a sales method to be associated with each opportunity and aids in charting and reporting accuracy.

Sales methods can differ within a company. For example, a sales method for managing a complex multimillion dollar opportunity might include 15 stages, while a sales method for a simple low-dollar opportunity might require only four stages.



Your application administrator creates and implements the sales stages that your company uses. For more information about creating or implementing sales methods, see [“Defining a Sales Methodology” on page 202](#).

[Table 83](#) shows sales methodologies (Accelerated, Default, Standard), and the associated sales stage for each methodology (for example, 01 - Prospecting). The table also shows if the record is a lead or is an opportunity at each sales stage.

Table 83. Sales Methods and Sales Stages

| Accelerated        | Default and Standard | Lead or Opportunity |
|--------------------|----------------------|---------------------|
| 01 - Prospecting   | 01 - Prospecting     | Lead                |
|                    | 02 - Potential Lead  | Lead                |
| 02 - Qualification | 03 - Qualification   | Opportunity         |
|                    | 04 - Opportunity     | Opportunity         |
|                    | 05 - Building Vision | Opportunity         |
|                    | 06 - Short List      | Opportunity         |
|                    | 07 - Selected        | Opportunity         |
| 03 - Closing       | 08 - Negotiation     | Opportunity         |
|                    | 09 - Closed or Won   | Opportunity         |
| 04 - Lost          | 09 - Closed or Lost  | Opportunity         |

**NOTE:** The Portfolio Management Process sales methodology does not focus on opportunities and so is not present in [Table 83](#).

## Process of Managing Opportunities

To manage opportunities, perform the following tasks:

- **Create an opportunity.** For more information, see [“Creating an Opportunity” on page 370](#).
- **Change the primary team member.** For more information, see [“Changing the Primary Sales Team Member” on page 373](#).
- **Monitor transactions.** For more information, see [“Monitoring Significant Opportunity Transactions” on page 374](#).
- **Assess opportunities.** For more information, see [“Assessing an Opportunity” on page 374](#).
- **Manage decisions.** For more information, see [“Viewing Decision Issues for an Opportunity” on page 374](#).
- **Add contacts.** For more information, see [“Associating a Contact with an Opportunity” on page 375](#).

- **Add activities.** For more information, see [“Managing Activities Associated with an Opportunity” on page 375.](#)
- **Associate products.** For more information, see [“Associating a Product with an Opportunity” on page 375.](#)
- **Create quotes.** For more information, see [“Creating a Quote from an Opportunity” on page 376.](#)
- **Performing an organization analysis.** For more information, see [“Creating an Organization Analysis” on page 378.](#)
- **Adding attachments and notes.** For more information, see *Siebel Fundamentals*.
- **Generate and viewing charts and reports.** For more information, see [“Viewing Opportunity Charts” on page 380.](#)

While you are in a view, click Reports in the toolbar to access the available preconfigured reports for the data in that view. For more information about reports, see *Siebel Reports Guide*.

- **Set up lead sources.** For more information, see [“Setting Up Lead Sources for Opportunities” on page 382.](#)

## Creating an Opportunity

Create a new record each time you identify an opportunity.

**NOTE:** Each time a new opportunity record is created, a primary Revenue record is automatically created for the opportunity.

This task is a step in [“Process of Managing Opportunities” on page 369.](#)

### To create an opportunity

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 In the Opportunities List, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field         | Comments                                                                                                                                                                                                                                                                    |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Revenue       | Type the currency amount of the opportunity. If you are using the Products, Quotes or Revenue views, then you can make sure your summary revenues are calculated and are in sync. This amount affects forecasting.                                                          |
| Committed     | Select the check box to indicate a high probability that the deal will close, and that the deal will be included in your revenue forecast.                                                                                                                                  |
| Probability % | Select a percentage for the confidence you have that the deal will close with the specified revenue on the specified close date. The sales stage of the opportunity determines an automatic adjustment of the probability. You can manually override the probability value. |

| Field              | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Method       | Select the sales methodology.                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Sales Team         | <p>Select the employees in the sales team for the opportunity. Only the manager of the primary sales team member, or an administrator, can change or delete the sales team member identified in the Primary field.</p> <p>You can set a Priority flag for individual members of the sales team. If an opportunity is a priority for all team members, then the Priority Flag is set in the Opportunity List and Explorer views.</p>                                                    |
| Currency           | Select the currency type associated with the opportunity. The selected value does not affect forecasting.                                                                                                                                                                                                                                                                                                                                                                              |
| Sales Stage        | Select the sales stage associated with the selected sales method.                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Lead Partner       | <p>Select the lead partner. This field is automatically populated when the source of the opportunity is a campaign with a lead partner.</p> <p>If you create an opportunity from a response, and the response had a campaign associated with it, then the opportunity inherits the lead partner from the campaign.</p> <p>If you create a new opportunity and select a campaign as the source, then the opportunity inherits the campaigns lead partner, if it has a lead partner.</p> |
| Close Date         | Select the expected date on which the opportunity closes. The default date is the same as the Created Date. It is important to modify the date, if the opportunity closes on a different date, because this date is used in revenue forecasting.                                                                                                                                                                                                                                       |
| Primary            | Displays the user ID of the primary sales team member. This value defaults to your user ID if you are creating a new opportunity.                                                                                                                                                                                                                                                                                                                                                      |
| Executive Priority | Select the check box to indicate a significant opportunity. Sales executives can query for high-priority opportunities for tracking purposes.                                                                                                                                                                                                                                                                                                                                          |
| Revenue Type       | Select a value for the kind and source of the expected revenue. For more information, see <a href="#">"About Revenue Class and Revenue Type" on page 372.</a>                                                                                                                                                                                                                                                                                                                          |
| Territory          | Displays the territory for the opportunity. The default value is based on the territories that your company defines. Your system administrator controls the territory assignment function set up by your sales manager.                                                                                                                                                                                                                                                                |
| Revenue Class      | Select a value for the quality of the expected revenue. For more information, see <a href="#">"About Revenue Class and Revenue Type" on page 372.</a>                                                                                                                                                                                                                                                                                                                                  |
| Channel            | Select the sales channel from which the opportunity comes.                                                                                                                                                                                                                                                                                                                                                                                                                             |

- 3 Drill down on the Opportunity Name field of the record, and navigate to the More Info view to complete more fields.

Some fields are described in the following table.

| Field                   | Comments                                                                                                                                                                                                                                                                                            |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Source                  | Select the source of the sales lead for the opportunity. Typical source values include specific events, campaigns, or conferences.                                                                                                                                                                  |
| Source Type             | Displays the category of the primary source. For example, a specific seminar that is the source of the opportunity is identified with a value of Seminar in this field.                                                                                                                             |
| Organization            | Select the organizations associated with the opportunity. The default value is the organization name associated with the person creating the opportunity. Your system administrator sets up organizations in your Siebel application. You can associate multiple organizations with an opportunity. |
| Partner Approval Status | Select the approval status of the lead partner for the opportunity.                                                                                                                                                                                                                                 |
| Expected Value          | Displays a currency value that is calculated using the potential revenue field multiplied by the value in the probability field. A lower percentage in the probability field reduces the expected value that is included in your revenue forecast.                                                  |
| Best Case               | Type the amount the deal might generate in the best-case scenario. This amount is higher than the value in the Revenue field.                                                                                                                                                                       |
| Worst Case              | Type the currency amount the deal might generate in the worst-case scenario. This amount is lower than the value in the Revenue field.                                                                                                                                                              |
| Cost                    | Type the amount of expense associated with the opportunity.                                                                                                                                                                                                                                         |
| Margin                  | Displays the revenue amount minus the cost amount.                                                                                                                                                                                                                                                  |
| Reason Won/Lost         | Select a value for the reason that the opportunity was accepted, rejected, rerouted, won, or lost.                                                                                                                                                                                                  |

## About Revenue Class and Revenue Type

Revenue Class and Revenue Type fields appear on both the Opportunity and the Revenue forms. These two fields are the same fields, which means changes made in the Opportunity form are reflected on the Revenue form and changes made in the Revenue form appear in the Opportunity form.

The Revenue Class and Revenue Type lists of values are based on the internal business process for each company. The standard values can be adapted to your business, or the lists of values changed by your application administrator to reflect the stages of your company's sales process and the manner in which your company recognizes revenue.

- **Revenue Class Field.** Your company can define the quality of the revenue at a specific time by setting the list of values in the Revenue Class field to reflect the sales stages you use. Sample values are Pipeline, Upside, Expected, Committed, and Closed. For more information about the Revenue Class field, see *Siebel Forecasting Guide*.
- **Revenue Type Field.** Your company might want to differentiate between kinds of revenues and their sources. For example, your company might classify revenue by Software, Consulting, and Hardware categories, or by Booked versus Billed revenue, which are defined in the list of values. Defining revenue types allows you to query revenues or view charts sorted by the category of the revenue. For more information about the Revenue Type field, see *Siebel Forecasting Guide*.

## About Split Revenue

A revenue split allows you to forecast how revenue from an opportunity is split between multiple sales representatives. The Split Revenue field indicates that the revenue is split in the Revenues view. For more information about the Split Revenue field, see *Siebel Forecasting Guide*.

# Changing the Primary Sales Team Member

The administrator or manager of the primary sales representative can change the person assigned as the primary member of the sales team.

This task is a step in [“Process of Managing Opportunities” on page 369](#).

## To change a primary team member

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 From the visibility filter, select My Team's Opportunities.
- 3 In the Opportunities list, drill down on the Opportunity Name field of the opportunity record.
- 4 Navigate to the More Info view.
- 5 In the More Info form, click the select button in the Sales Team field.
- 6 In the Team Members dialog box, select the Primary check box for the team member.

**NOTE:** If you have access to the Administration - Data screen, then you can change a primary team member assignment on that screen.

## Monitoring Significant Opportunity Transactions

Sales executives can monitor significant opportunity transactions by querying for opportunities flagged as Executive Priority. These flagged opportunities can be tracked by the executive team regardless of the revenue or forecast commitment. Tracking high-priority opportunities helps the executive maintain the most accurate quarterly revenue forecast and plan involvement in the most promising opportunities.

This task is a step in [“Process of Managing Opportunities” on page 369](#).

### *To flag an opportunity as an executive priority*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 In the Opportunities list, select the opportunity.
- 3 In the Opportunities list, use the Columns Displayed option in the menu for the cogwheel icon to display the Executive Priority field.
- 4 In the opportunity record, click the check box in the Executive Priority field.

## Assessing an Opportunity

You can use assessments to compare opportunities with each other, compare them with a model, or to determine the information that is present or not present for an opportunity. To perform the assessment, you enter values for the assessment attributes. The Siebel application calculates a composite assessment value for the opportunity. For information about how to perform an assessment, see [“Performing an Assessment \(End User\)” on page 214](#).

This task is a step in [“Process of Managing Opportunities” on page 369](#).

## Viewing Decision Issues for an Opportunity

Decision issues are specific areas of interest that can influence a prospect's buying decision during the sales cycle. These decision issues provide you with an opportunity to present the advantages of your solution to the customer.

You can track these decision issues using the Opportunity screen's Decision Issues view, and use this information to develop your sales strategy and address customer concerns. For more information, see [Chapter 36, “Decision Issues.”](#)

This task is a step in [“Process of Managing Opportunities” on page 369](#).

## Associating a Contact with an Opportunity

As you work with an opportunity, you want to maintain information about the contacts associated with the opportunity. For more information about contacts, see [Chapter 24, "Contacts."](#)

You can use the Contacts view from the Opportunity screen to store and review contact-related information for an opportunity.

This task is a step in ["Process of Managing Opportunities" on page 369.](#)

### *To associate a contact with an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 In the Opportunities list, drill down on the Opportunity Name field of the opportunity record.
- 3 Navigate to the Contacts view.
- 4 In the Contacts list, add an existing contact, select the contact from the Add Contacts dialog box, and click OK.

**NOTE:** To select a sequence of contact records, hold down the SHIFT key and click the contact records. To select multiple contacts that are not in sequence, hold down the CTRL key and click the contact records.

## Managing Activities Associated with an Opportunity

The Opportunities screen's Activities view allows you to track activities at the opportunity level, maintain a calendar and To Do list for the opportunity, and delegate activities related to the opportunity to your sales team. For more information about Activity Plans and associated activities, see [Chapter 15, "Activities."](#)

This task is a step in ["Process of Managing Opportunities" on page 369.](#)

## Associating a Product with an Opportunity

Specific products can be associated with an opportunity. For example, if a customer is interested in purchasing a new software suite, then this information can be specified in the Products view.

After the product is associated with the opportunity, you can drill down on the Product field of the product record to review additional information such as product features and prices.

Later, this data can be used when you are building a presentation, quote, or proposal for the opportunity.

This task is a step in ["Process of Managing Opportunities" on page 369.](#)

**To associate a product with an opportunity**

- 1** Navigate to the Opportunities screen, then the Opportunities List view.
- 2** In the Opportunities list, drill down on the Opportunity Name field of the opportunity record.
- 3** Navigate to the Products view.
- 4** Create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field           | Comments                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Auto Quote      | Select the check box if you want to include the product in automatic quotes generated for the opportunity.                                                                                                                                                                                                                                                                                    |
| Quantity        | Type the number of product units that the customer wants to purchase.                                                                                                                                                                                                                                                                                                                         |
| Net Price       | Type the price of the item minus discounts.                                                                                                                                                                                                                                                                                                                                                   |
| Revenue         | Displays the revenue for the opportunity, calculated as the Quantity multiplied by the Net Price.                                                                                                                                                                                                                                                                                             |
| Covered Product | Select the covered product only if the product (specified in the Product field) is a service product.                                                                                                                                                                                                                                                                                         |
| Summary         | <p>Select the check box to indicate that the product is a summary product.</p> <p>For example, if the opportunity is for a computer, then select the Summary check box for the computer product, but not for the CPU, monitor, keyboard, and mouse products that make up the computer product.</p> <p>This Summary field also appears (read-only) in the Revenues screen, then List view.</p> |

## Creating a Quote from an Opportunity

Using the Quotes view, you can automatically create and revise quotes for the opportunity. For more information about quotes and orders, see *Siebel Order Management Guide*.

This task is a step in ["Process of Managing Opportunities" on page 369](#).

**To create a quote from an opportunity**

- 1** Navigate to the Opportunities screen, then the Opportunities List view.
- 2** Drill down on the Opportunity Name field of the opportunity record.
- 3** Navigate to the Products view, add a product in the Products list, and complete the necessary fields.
  - a** In the Auto Quote field, select the check box to display a check mark.



**b** In the Quantity field, type the number of product units the customer wants to purchase.

For more information, see [“Associating a Product with an Opportunity” on page 375](#).

**4** Navigate to the Quotes view, and click Automatic Quote in the Quotes list.

A quote record is automatically created, with some fields completed and a status of In Progress.

**5** For the quote record, complete the following steps:

**a** If no price list is associated with the account, then select a price list in the Price List field.

If a price list is associated with the account, then the Price List field is automatically populated. For more information about price lists, see *Siebel Pricing Administration Guide*.

**b** Drill down on the Name field.

You can change the automatically generated name for a name that is more meaningful in the quote details form.

**6** In the Line Items list for the quote, add line items, click the cogwheel icon, and select Reprice.

The Reprice function makes sure that the quote total reflects the prices from the price list, and multiplies those prices by the quantities that you enter in the products view.

**7** In the Quote form, click the cogwheel icon, and select Update Opportunity, and then return to the Opportunity form.

The Update Opportunity function verifies that the opportunity's revenue line items are in sync with the quote line items.

**TIP:** Use the History icon or the thread bar to navigate back to the Opportunity form.

## Updating Opportunity Revenues

Complete the following procedure to update opportunity revenues.

### *To update opportunity revenues*

**1** Navigate to the Opportunities screen, then the Opportunities List view.

**2** Drill down on the Opportunity Name field of the opportunity record.

**3** Navigate to the Revenues view, then the List view.

**4** In the Revenues list, click the cogwheel icon, and select Update Opportunity.

After this process is completed, the revenue amounts that appear in the Products, Revenues, and Quotes views are synchronized and the Opportunity's Revenue field displays a calculated sum of the individual revenue line items associated with the opportunity.

**NOTE:** Siebel Quotes is a separately licensed product offering. You cannot access the Quotes view if you have not licensed this product.

## Creating an Organization Analysis

You can automatically create organization charts to help you analyze your key contacts and develop your relationship strategy to win the opportunity.

Siebel Sales automatically generates organization charts using the contacts associated with each opportunity. When you update contact information, your changes are reflected in the organization chart. You can update contact information from either the Opportunities screen or from the Contacts screen.

This task is a step in ["Process of Managing Opportunities" on page 369](#).

### *To add existing contacts to the organization analysis*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of the opportunity record.
- 3 Navigate to the Organization Analysis view.
- 4 Use the form at the top of the screen to query for the opportunity.
- 5 In the Organization Chart view, create a new record, select one or more contacts in the Add Contacts dialog box, and click OK.

**NOTE:** To select a sequence of contact records, hold down the SHIFT key, and click the contact records. To select multiple contacts that are not in sequence, hold down the CTRL key, and click the contact records.

## Creating New Contact for the Organizational Analysis

Complete the following procedure to create new contacts for the organization analysis.

### *To create new contacts for the organization analysis*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of the opportunity record.
- 3 Navigate to the Organization Analysis view.
- 4 In either the default Organization Chart view or in the Contacts list (toggle view), create a new record.
- 5 In the Add Contacts dialog box, create a new record.

- 6 In the new contact record enter the contact information in the fields, and then save the record.

**NOTE:** If you create a new contact directly from the Organization Chart view, then you must save the record to return to the Organization Chart view.

The following table shows the shading that appears in the contact node in the organization chart for each value in the Level of Influence field.

| Field Value                  | Shading    |
|------------------------------|------------|
| Low                          | None       |
| Political Structure (Medium) | Light gray |
| Inner Circle (High)          | Dark gray  |

## Creating the Organization Hierarchy

From the Organization Chart view, you can create the organization hierarchy to indicate professional relationships within the organization.

### To create the organization hierarchy

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of the opportunity record.
- 3 Navigate to the Organization Analysis view.
- 4 In the organization chart, click the white dot at the bottom of the node for a manager, and drag that dot to the white dot at the top of the node for the subordinate.

A line that reflects the reporting relationship between the contacts appears.

- 5 Repeat [Step 4](#) for each contact until you complete the organization chart.

**NOTE:** The reporting relationships are also stored in the Contacts list (toggle view). Information about the manager of the contact appears in the Manager Last Name field and Manager First Name field. Use the Columns Displayed option in the menu for the cogwheel icon to display these fields.

## Drawing Lines of Influence

You can track the political structure in a customer organization by identifying lines of influence between contacts. Tracking lines of influence helps you identify contacts who are not highly ranked (and are easier to access) but have significant influence on key decision makers.

Information about lines of influence is automatically updated in the Relationships view of the Contacts screen. You can add lines of influence in the Relationships view.

### To draw lines of influence

- 1 Navigate to the Opportunities screen, then the Opportunities List view.

- 2 Drill down on the Opportunity Name field of the opportunity record.
- 3 Navigate to the Organization Analysis view.
- 4 In the organization chart, click the blue dot at the side of the node for a contact, and drag that dot to the blue dot at the side of the node for another contact.  
A line that reflects the influence between the contacts appears.
- 5 Repeat [Step 4](#) for each contact until you draw all lines of influence.
- 6 To delete a line that reflects an influence, click the line, and select Delete in the Actions list.

## Viewing Opportunity Charts

Several charts are available that support analysis of opportunities data. The data can be depicted in a variety of formats such as pie graph, bar graph, and so on.

[Table 84](#) describes each opportunity analysis chart.

Table 84. Opportunities Charts

| Chart                         | Description                                                                                                                                              |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity Analysis             | Displays the number of activity types for the selected record.                                                                                           |
| Current Opportunity Analysis  | Displays a scatter diagram of the selected opportunity by revenue and probability. The bottom chart displays sales stage.                                |
| Lead Analysis                 | Displays the number of opportunities or revenue by organization or primary sales representative. The data is segmented by lead quality.                  |
| Lead Source Analysis          | Displays the number of opportunities, revenue, or average revenue by time period. The data is segmented by lead source.                                  |
| Lead Source Pipeline Analysis | Displays the number of opportunities by sales stage and lead source.                                                                                     |
| New Business Analysis         | Displays the number of opportunities, revenue, or average revenue over a time period.                                                                    |
| Opportunity Analysis          | Displays the number of opportunities by product, source, territory, and competitor.                                                                      |
| Pipeline Analysis             | Displays the number of opportunities or revenue by sales stage, organization, revenue size, or sales method.                                             |
| Probability Cluster Analysis  | Displays a scatter diagram of your opportunities by revenue and probability.                                                                             |
| Rep Analysis                  | Displays the number of opportunities, revenue, or average revenue by sales representative. The data can be segmented by sales stage and win probability. |
| Revenue Analysis by Rep       | Displays the number of opportunities and revenue by sales representative.                                                                                |

Table 84. Opportunities Charts

| Chart                          | Description                                                                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------|
| Sales Method Bar               | Displays the number of opportunity products or revenue by sales method. The data is segmented by sales stage. |
| Sales Pipeline Analysis        | Displays the percentage of revenue quota and percentage of count quota.                                       |
| Sales Pipeline Phases Analysis | Displays sales pipeline phases and the percentage of revenue quota or count quota achieved for each phase.    |

This task is a step in [“Process of Managing Opportunities”](#) on page 369.

## Viewing the Opportunity Sales Pipeline Analysis Chart

The Sales Pipeline Analysis works by evaluating the total revenue and count of opportunities by a selected sales methodology and then evaluating the total against each applicable quota.

**NOTE:** The Sales Pipeline Analysis Chart considers only active Quota plans, regardless of duration.

### To display sales pipeline analysis information

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 From the visibility filter, select an Opportunities list.  
For example, you might select All Opportunities.
- 3 In the Opportunities list, query for a value in the Sales Method field.
- 4 Navigate to the Charts view.
- 5 In the Charts list, select Sales Pipeline Analysis from the drop-down list.
- 6 From the secondary drop-down list, select either % of Count Quota or % of Revenue Quota, and then click Go.

**NOTE:** Pipeline charts cannot be copied by dragging (as pie and bar charts can).

## Viewing the Sales Pipeline Phases Analysis Chart

The Sales Pipeline Phases chart provides an overall view of the revenue generated for opportunities in an organization. Sales phases are basic components used to group stages together into basic sales categories.

### To view the sales pipeline phases analysis chart

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 From the visibility filter, select an Opportunities list.
- 3 In the Opportunities list, query for a value in the Sales Method field.

- 4 Navigate to the Charts view.
- 5 In the Charts list, select Sales Pipeline Phases Analysis from the drop-down list.
- 6 From the secondary drop-down list, select either % of Count Quota or % of Revenue Quota, and then click Go.

## Setting Up Lead Sources for Opportunities

Lead sources for opportunities are created, modified, and deleted through the Lead Sources Administration view of the Opportunities screen.

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

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

This task is a step in [“Process of Managing Opportunities” on page 369](#).

### To create a lead source

- 1 Navigate to the Opportunities screen, then the Lead Sources Administration view.
- 2 Create a new record, and complete the necessary fields.

Some of the fields are described in the following table.

| Field       | Comments                                                                                          |
|-------------|---------------------------------------------------------------------------------------------------|
| Start Date  | Select the start date of the campaign.                                                            |
| End Date    | Select the end date of the campaign.                                                              |
| Description | Type a brief description about the campaign.                                                      |
| Source      | Type the source of the campaign. For example, a new product line, a marketing seminar, and so on. |
| Objective   | Type the objective of the campaign.                                                               |
| Target      | Type the target customer base for the campaign                                                    |
| Type        | Select the type of the campaign. For example, marketing campaign, direct marketing, and so on.    |

# 32 Households

This chapter describes how call center agents can use the Households screen to record information about groups of individual consumers who interact with the agents' company. It includes the following topics:

- [Household Contact Tracking on page 383](#)
- [Scenario for Managing Households on page 384](#)
- [Process of Managing Households on page 384](#)
- [Adding a Household Record on page 384](#)
- [Adding Contacts to a Household on page 385](#)
- [Adding Activities to Household Records on page 387](#)
- [Storing and Viewing Information About Households on page 388](#)
- [Synchronizing Household Information with External Applications on page 389](#)

## Household Contact Tracking

A household is a collection of individual consumers who are economically affiliated and who share common purchasing or service interests. Individuals might be related to each other and might belong to other households. Typically, a household shares the same residential address. Siebel Call Center allows an organization to address the complexity of dynamic households by tracking all household information through the appropriate household contact. If contacts leave a household to join another household, then their associated information moves with them.

The Households screen displays information about customer households. You can use the Households screen and its related views to work with the following kinds of information:

- Contacts (household members)
- Activities
- Attachments
- Service Requests
- Notes
- Assets
- Opportunities
- Agreements

The Household views summarize information that relates to all the individual contacts who are members of the household. For example, you might want to view a list of all the service requests from a particular household, regardless of which household member made the request.

The Household More Info view and the Household Contacts view allow editing, but other Household views are read-only.

If you want to add activities, service requests, notes, attachments, assets, opportunities, and agreements, then you must navigate to the Household Contact list and drill down on the appropriate field to reach a view where you can enter the necessary information.

Household information is closely related to information about contacts, and is similar to information about accounts. Other chapters in this guide provide more detailed information about how to use the Contacts and Accounts screens.

## Scenario for Managing Households

This topic gives one example of how household management might be used. You might use household management differently, depending on your business model.

Call center agents commonly use the Households screen in a business-to-consumer setting. Viewing household information allows for cross-selling, upselling, and sell-through opportunities. Combined with Oracle's Siebel Marketing and Oracle Business Intelligence, the Households screen provides the basis for consumer segmentation and analysis.

The Households screen displays market segment information about the household as a whole and a summary of information about the individual contacts who are household members. Call center agents use the Households screen to identify and capture demographic information about a household, and also to review assets, products, activities, and contact information associated with the household. This information helps the agent assess the customer's data and history to better meet the customer's needs.

## Process of Managing Households

To manage households, perform the following tasks:

- ["Adding a Household Record" on page 384](#)
- ["Adding Contacts to a Household" on page 385](#)
- ["Adding Activities to Household Records" on page 387](#)
- ["Storing and Viewing Information About Households" on page 388](#)
- ["Synchronizing Household Information with External Applications" on page 389](#)

## Adding a Household Record

Use the following procedure to add a household record.

This task is a step in ["Process of Managing Households" on page 384](#).



**To add a household**

- 1 Navigate to the Households screen, then the List view.
  - 2 In the list and the form below it, create a new record, and complete the necessary fields.
- Some fields are described in the following table.

| Fields            | Comments                                                                                                                                                                                                                           |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Household #       | Displays a unique identifier for the household.                                                                                                                                                                                    |
| Name              | Type a name that identifies the household. Typically this name is the last name of one or more contacts who are members of the household.                                                                                          |
| Type              | Select the type of people that make up the household. Typical values include Family - Children, Family - No children, Family - Senior Citizen, and Single.                                                                         |
| Category          | Select the value of the household to your organization. Available values are Platinum, Gold, Silver, and Standard.                                                                                                                 |
| Segment           | Select the general economic class of the household, or home-ownership status. Typical values are White Collar, Blue Collar, Rural, Own Residence, and Renter.                                                                      |
| Status            | Select the current stage in the customer interaction life cycle. Defaults to Active for a new household record.                                                                                                                    |
| Team              | Select the employees assigned to work with this household. If a call center user is not a member of the household team, then that user does not receive information about this household during Mobile Web Client synchronization. |
| Organization      | Select the organization that interacts with the household.                                                                                                                                                                         |
| Income            | Type the total income from all members of the household.                                                                                                                                                                           |
| Head of Household | Select the name of the main decision-maker for the household. Available values are all the contacts for the household.                                                                                                             |
| Revenue           | Type the amount of revenue your organization obtains from this household.                                                                                                                                                          |
| Wealth            | Select the estimated total wealth of the household.                                                                                                                                                                                |
| Size              | Type the total number of people in the household.                                                                                                                                                                                  |
| Address           | Displays the address of the primary household contact.                                                                                                                                                                             |
| City              | Displays the name of the city where the primary household contact resides.                                                                                                                                                         |
| State             | Displays the name of the state where the primary household contact resides.                                                                                                                                                        |
| Zip Code          | Displays the zip code of the primary household contact.                                                                                                                                                                            |

## Adding Contacts to a Household

Contacts are individuals associated with a household. Agents can specify one person in the household as the head of household and then identify the others as spouse, child, or dependent parent.

This task is a step in [“Process of Managing Households” on page 384](#).

***To add contacts to a household***

- 1** Navigate to the Households screen, then the List view.
- 2** Drill down on the Name field of the household record to which to add the contacts.
- 3** Navigate to the Contacts view.
- 4** In the Contacts list, perform one of the following steps to specify the contact to add:
  - Add an existing contact to the household, select the contact from the Add Contacts dialog box, and click OK.
  - Create a new record in the Contacts list.
- 5** Complete the necessary fields for the record.

Some of the fields are described in the following table.

| Field         | Comments                                                                                            |
|---------------|-----------------------------------------------------------------------------------------------------|
| Primary       | Select the check box to designate the current contact as the main decision-maker for the household. |
| Income        | Type the contact's income. This value is not used to calculate the household's total income.        |
| Relationship  | Select the role of the contact within the household.                                                |
| Households    | Select one or more households in which the contact is a member.                                     |
| Alias         | Type the contact's nickname if you create a new contact for the household.                          |
| Employee Flag | Displays a check box that indicates the contact is an employee of your company.                     |

**Specifying Addresses for Household Contacts**

Complete the following procedure to specify an address for the household contact.

***To specify an address for the household contact***

- 1** Navigate to the Households screen, then the List view.
- 2** Drill down on the Name field of a household record.
- 3** Navigate to the Contacts view, select the contact in the Contacts list, and drill down on the Last Name field.
- 4** Navigate to the Addresses List view, create a new record in the Address list, and complete the necessary fields.
- 5** Click the thread bar to return to the Contacts view of the Households screen, and then scroll down to display the Contact form.

- 6 In the Contact form, complete the following steps:
  - a Click the select button in the Address field to display the Contact Addresses dialog box.
  - b In the Contact Addresses dialog box, select the Primary check box for the contact's main address, and click OK.
  - c In the Contact form, complete additional fields.

Some of the fields are described in the following table.

| Field   | Comments                                                                                                                                             |
|---------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account | Select the business or organization associated with the contact.                                                                                     |
| Site    | Displays the site of the account associated with the contact.                                                                                        |
| Address | Select the contact's address or addresses. The procedure for entering the addresses to appear in this field is described in <a href="#">Step 4</a> . |
| Email   | Type the contact's email address.                                                                                                                    |

**NOTE:** In the Households screen, a contact's address is the residential or personal address. In the Contacts screen, the address in the Contact form is the address of the account associated with the contact. In the Addresses List view of the Contacts screen, you can specify a contact's other addresses. You can select household addresses only from these individual contact addresses.

## Adding Activities to Household Records

Add activity records to household records to track appointments, meetings, email messages, and other tasks related to households. The following procedure describes how to add an activity from the Household screen. For more information about activities, see [Chapter 15, "Activities."](#)

This task is a step in ["Process of Managing Households"](#) on page 384.

### *To add an activity for a household*

- 1 Navigate to the Households screen, then the List view.
- 2 Drill down on the Name field of the household record to which to add the activity.
- 3 Navigate to the Contacts view.
- 4 In the Contacts list, select the contact, and then drill down on the Last Name field.  
The Activities view for the Contacts screen appears.
- 5 In the Activities list, create a new record, and complete the necessary fields.  
The fields are described in [Chapter 15, "Activities."](#)

## Storing and Viewing Information About Households

The following types of information can be indirectly related to a household by associating the information with the contact record for any member of the household:

- Attachments
- Notes
- Opportunities
- Service Requests
- Agreements
- Assets

The Household screen's views that correspond to these types of information are read-only. The information must be stored and modified using Contact screen views.

This task is a step in ["Process of Managing Households" on page 384](#).

### Storing Information Related to Household Contacts

Complete the following procedure to store additional information related to a household contact.

#### *To store additional information related to a household contact*

- 1 Navigate to the Households screen, then the List view.
- 2 Drill down on the Name field of a household record.
- 3 Navigate to the Contacts view.
- 4 In the Contacts list, drill down on the Last Name field to display the Contacts screen.
- 5 Navigate to the following views for the type of information you want to add:
  - Attachments
  - Notes
  - Opportunities
  - Service Requests
  - Agreements
  - Assets

- 6 In the view list, create a new record, and complete the necessary fields.

If the contact who is associated with Attachments, Notes, Opportunities, Service Requests, Agreements, or Assets leaves the household, then the information stays accessible through the Household screen if users register the contact's departure by adding an exit date to the Household Contact record. If a user deletes the Household Contact record for the departing contact, then the information associated with that contact is no longer associated with the contact's former household.

## Viewing Information Related to Households

Complete the following procedure to view additional information related to a household.

### *To view additional information related to a household*

- 1 Navigate to the Households screen, then the List view.
- 2 Drill down on the Name field of a household record.
- 3 Navigate to the following views for the type of information you want to view:
  - Attachments
  - Notes
  - Opportunities
  - Service Requests
  - Agreements
  - Assets

The corresponding list appears.

# Synchronizing Household Information with External Applications

The Application Services Interface (ASI) feature allows you to synchronize the household data between a Siebel application and an external application in real time. This feature enables you to maintain consistent household information across your enterprise, and to eliminate manual entry of data in multiple applications.

If your Siebel administrator has set up real-time household integration between a Siebel application and another application, then you can use the Update External System command to send new and modified household information from the Siebel application to the other application in real time. For more information about ASI, see *Siebel Application Services Interface Reference* and [Chapter 26, "Integration Using ASIs."](#)

This task is a step in ["Process of Managing Households" on page 384.](#)

***To synchronize household information with an external application***

- 1** Navigate to Households, then the Household List.
- 2** In the Household list, select a household record.  
To create a new household record, see ["Adding a Household Record" on page 384](#).
- 3** In the Household list, click the cogwheel icon, and select Update External System.

# 33 References

This chapter describes how sales professionals can use the References screen to access accounts that can be designated as references, and to associate contacts, activities, profiles, and notes with each reference. It includes the following topics:

- [Scenario for Managing References on page 391](#)
- [Process of Managing Accounts and References on page 392](#)
- [Designating an Account as a Reference on page 392](#)
- [Associating an Activity with a Reference on page 393](#)
- [Associating a Contact with a Reference on page 393](#)
- [Associating an Attachment with a Reference on page 393](#)
- [Viewing Reference Activities in the Calendar on page 394](#)
- [Adding a Note to a Reference on page 394](#)
- [Adding Profile Information to a Reference on page 395](#)
- [Searching for References on page 395](#)
- [Viewing Reference Asset and Profile Charts on page 395](#)

## Scenario for Managing References

This topic gives one example of how reference management might be used. You might use reference management differently, depending on your business model.

A sales representative is attempting to win a 2,500-seat software sales opportunity for his company. In a series of meetings with the prospect, the sales representative demonstrates his product line and submits a quote. The sales representative receives a call from the prospective customer requesting a chance to speak with existing software customers as a point of reference before agreeing to the terms of the quote.

The sales representative searches the list of references, and performs a query to find accounts that meet specific criteria. The accounts must be designated as referenceable, in the same industry as the prospective customer, and listed as maintenance in the sales stage.

The sales representative finds companies that meet the criteria. She selects a company for the reference, and telephones the primary representative to get permission to use the customer as a reference. The representative agrees and sets up a conference call to discuss the opportunity with the prospect.

## Process of Managing Accounts and References

The References screen provides you with customer reference information that you can use as a sales tool when managing sales, marketing, and public relations initiatives. As a sales team member, providing potential customers with a list of referenceable accounts adds immediate legitimacy to any sales situation and gives you a competitive advantage. You also can use the References screen to determine the best reference for a current initiative.

You can use the References list to search for accounts that are referenceable. A calendar view of reference activities is also available.

To manage accounts and references, perform the following tasks:

- [“Designating an Account as a Reference” on page 392](#)
- [“Associating an Activity with a Reference” on page 393](#)
- [“Associating a Contact with a Reference” on page 393](#)
- [“Associating an Attachment with a Reference” on page 393](#)
- [“Viewing Reference Activities in the Calendar” on page 394](#)
- [“Adding a Note to a Reference” on page 394](#)
- [“Adding Profile Information to a Reference” on page 395](#)
- [“Searching for References” on page 395](#)
- [“Viewing Reference Asset and Profile Charts” on page 395](#)

## Designating an Account as a Reference

You can mark an account as referenceable using the check box in the account record's Reference field. During the reference process, you can set the reference stages.

This task is a step in [“Process of Managing Accounts and References” on page 392](#).

### ***To designate an account as a reference***

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the More Info view.
- 4 In the Account details form, select the Reference check box.



## Associating an Activity with a Reference

In the Activities view, you can see each activity associated with an account. Activities associated with a reference appear in the Calendar view. Reference record fields provide information about the primary representative, the corporate sponsor, and so on. For more information about using the Calendar, see *Siebel Fundamentals*.

This task is a step in [“Process of Managing Accounts and References” on page 392](#).

### **To associate an activity with a reference**

- 1 Navigate to the References screen, then the Reference List view.
- 2 Drill down on the Stage field of a reference record.
- 3 Navigate to the Activities view.
- 4 In the Activities list, create a new record, and complete the necessary fields.

For more information, see [Chapter 15, “Activities.”](#)

## Associating a Contact with a Reference

You can designate a specific contact within a referenceable account. This contact can provide you with reference information or the individual can be the point-of-contact for activities associated with the account.

This task is a step in [“Process of Managing Accounts and References” on page 392](#).

### **To associate a contact with a reference**

- 1 Navigate to the References screen, then the Reference List view.
- 2 Drill down on the Stage field of a reference record.
- 3 Navigate to the Contacts view.
- 4 In the Contacts list, perform one of the following steps:
  - Add an existing contact, select the contact from the Add Contacts dialog box, and click OK.
  - Create a new record in the Contacts list, and complete the necessary fields for the contact.

## Associating an Attachment with a Reference

The Attachments view lists attachments associated with a reference account. You can add new attachments or view attachments associated with the account. Reference Attachments include account attachments and reference attachments.

This task is a step in [“Process of Managing Accounts and References” on page 392](#).

### ***To associate an attachment with a reference***

- 1 Navigate to the References screen, then the Reference List view.
- 2 Drill down on the Stage field of a reference record.
- 3 Navigate to the Attachments view.
- 4 In the Attachments list, create a new record.

## **Viewing Reference Activities in the Calendar**

The Calendar view details all reference activities associated with the account. In the calendar, you can view, by month, the number of reference activities associated with the account. This view allows you to manage the number of initiatives for the account and determine if the customer is being contacted too often. For information about adding a reference activity to the calendar, see [“Associating an Activity with a Reference” on page 393](#).

This task is a step in [“Process of Managing Accounts and References” on page 392](#).

### ***To view reference activities in the calendar***

- 1 Navigate to the References screen, then the Reference List view.
- 2 Drill down on the Stage field of a reference record.
- 3 Navigate to the Calendar view.  
The reference form appears with the calendar.
- 4 Drill down on the link for an activity in the calendar to view details about that activity.

## **Adding a Note to a Reference**

The Reference screen's Notes view allows you to add notes to the selected reference account. Notes can be shared with others, and notes can be designated as private. Reference notes are visible in both the Account screen and the Reference screen. If you create a note in either the Accounts screen or the Reference screen, then the note is accessible in both views.

This task is a step in [“Process of Managing Accounts and References” on page 392](#).

### ***To add a note to a reference***

- 1 Navigate to the References screen, then the Reference List view.
- 2 Drill down on the Stage field of a reference record.
- 3 Navigate to the Notes view, then the Private Notes or Shared Notes view.
- 4 In the Notes list, create a new record, and complete the necessary fields.

## Adding Profile Information to a Reference

The Profile view allows you to update the account with information about the assets owned by the account, and information about the service profile. The service profile is a list of all external products the account is using in its operating environment. For example, if your company sells application software, then you might add information about the server hardware and end-user operating system used in conjunction with your products.

This task is a step in ["Process of Managing Accounts and References" on page 392](#).

### *To add profile information to a reference*

- 1 Navigate to the References screen, then the Reference List view.
- 2 Drill down on the Stage field of a reference record.
- 3 Navigate to the Profile view.  
The Profile list and the Service Profile list appear.
- 4 In the Profile list, create a new record, and complete the necessary fields.
- 5 In the Service Profile list, create a new record, and complete the necessary fields.

## Searching for References

Use the All References Read Only and All References Across Organizations Read Only lists to search for references applicable to your accounts. These views are read-only; you cannot modify information, and a contacts list is not available. To use the reference contact information, contact the reference owner, whose User ID appears in the Primary Rep field.

This task is a step in ["Process of Managing Accounts and References" on page 392](#).

### *To search for references*

- 1 Navigate to the References screen, then the Reference Read Only List view.
- 2 In the References list, query for the references by specifying criteria in the appropriate fields.
- 3 In the reference record, drill down on the Primary Rep field to view reference owner information.

## Viewing Reference Asset and Profile Charts

Reference charts provide a graphical analysis of referenced account assets and profiles. The Asset Analysis chart provides a graphical view of the assets. The Account External Product - Reference List chart provides a graphical representation of the profile information associated with all reference accounts. Both charts are read-only.

This task is a step in [“Process of Managing Accounts and References”](#) on page 392.

### ***To view asset and profile analysis charts***

- 1 Navigate to the References screen, then the Asset Analysis view or the Account External Product - Reference List view.

The reference assets or reference profile list appears with the analysis chart.

- 2 In the chart, select the type (3D, 2D) from the drop-down list, and then click Go.

# 34 Categories

This chapter describes how to use predefined categories to sort and search for specific criteria, and enter information that defines a personal sales approach and style. It includes the following topics:

- [Scenario for Managing Categories on page 397](#)
- [Adding a Category on page 397](#)
- [Searching by Category on page 398](#)

## Scenario for Managing Categories

This topic gives one example of how category management might be used. You might use category management differently, depending on your business model.

A sales representative wants to track information to help manage relationships with current and potential customers. Categories, which can be designated as private or shared with the sales team, provide the sales representative with a way to organize information about an account, opportunity, or contact.

The sales representative can track the most active accounts by creating a Hot Accounts category, and then select that category for each account that she wants to add to her active list.

The sales representative also can view a list of all the opportunities she has closed over a period of time. If she sets up a Closed category, then she can see which opportunities she has closed during the previous year.

Sales professionals also can use categories to track personal information about contacts. For example, a sales representative can record hobbies, such as golf or tennis, and designate that category for contacts she plans to invite to her company-sponsored sporting events. In addition, she can track family names or add contacts to a Holiday List category that allows her to create a seasonal mailing list.

**NOTE:** The categories discussed in this chapter are not the same as the categories associated with Catalog administration which are used primarily for access control. For information about this other kind of category, see *Siebel Order Management Guide*.

## Adding a Category

You can add categories to accounts, contacts, and opportunities. The procedure that follows explains how to add a category for accounts. You can add a category for contacts or opportunities by navigating to the appropriate screen. Category information can be shared with other members of the sales team or kept private.

***To add an account category***

- 1 Navigate to the Accounts screen, then the Accounts List.
- 2 Query the list for the account to which you want to add a category, and drill down on the Name field for that account.
- 3 Navigate to the Categories view.
- 4 In the categories list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field         | Comments                                                                                                                                                                                                                                                       |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category      | Select an existing category or create a new category.                                                                                                                                                                                                          |
| Category Rank | Type a numeric value that defines the category.                                                                                                                                                                                                                |
| Value         | Select a value or create a new value to assign to the category.                                                                                                                                                                                                |
| Private       | Select the check box to restrict sales team members from seeing how you have categorized the account. When the check box is selected, the category is private.<br><br>Clear the check box to designate the category as Public allowing access by team members. |

## Searching by Category

You can use the categories you and your team have defined to search for specific accounts, opportunities, and contacts. Sales professionals can track information about accounts, opportunities, and contacts using the Categories screen and associated views.

***To search by category***

- 1 Navigate to the Category screen, then the view that relates to the information that you require.  
For example, if you want to find the accounts associated with a particular category, then navigate to the Account Categories view.
- 2 Query for the appropriate category.  
The accounts, opportunities, or contacts associated with the category appear in the categories list.

# 35 Competitors

This chapter describes how to use the Competitors screen to examine comparisons of your company and competitors, view comparative literature of your products and those of your competitors, and associate a competitor with an opportunity. It includes the following topics:

- [Scenario for Managing Competitors on page 399](#)
- [Associating a Competitor with an Opportunity on page 399](#)
- [Viewing Competitor Comparisons on page 400](#)

## Scenario for Managing Competitors

This topic gives one example of how competitor management might be used. You might use competitor management differently, depending on your business model.

A sales representative logs into the Siebel Sales application and discovers a newly qualified opportunity. He navigates to the Competitors view to review the competition for the opportunity. One competitor is listed for the deal. The sales representative is not familiar with the company and drills down on the Name field for the competitor to learn more.

In the Company Comparisons view, the representative can view a side-by-side comparison of his company and the competitor's company as well as a comparison of products. He can access competitive intelligence documents compiled by his company about this competitor, and the literature items that the competitor has published.

A colleague in Telesales calls the sales representative and indicates that there is a new competitor trying to win the deal. The sales representative adds the new competitor to the opportunity to allow the sales team to research the new competition.

## Associating a Competitor with an Opportunity

Associating a competitor with an opportunity notifies the sales team about the competition for the deal and provides the team with a link to the information it needs to deliver a consistent, winning sales strategy.

### *To associate a competitor with an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List.
- 2 Drill down on the Opportunity Name field for the opportunity record to which you want to add a competitor.
- 3 Navigate to the Competitors view.

- 4 In the Competitors list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field    | Comments                                                                                                                                                                                                                   |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary  | Select this check box to indicate that the competitor is the primary rival for the deal.                                                                                                                                   |
| Name     | Select the competitor's company name. You can drill down on this field to navigate to the Competitors screen to obtain more information about the competitor.                                                              |
| Threat   | Select a value established by your company to specify the value of the competitor's threat. Default values include 1-Low, 2-Medium, 3-High, 4-Very High.                                                                   |
| Status   | Select a value established by your company to specify the prospect's interest level in the competitor's offerings. Default values include Some Interest, Evaluation in Progress, Existing Relationship, and Not Satisfied. |
| Comments | Type additional information about the competitor.                                                                                                                                                                          |

## Viewing Competitor Comparisons

In many sales situations it is necessary to discuss competitive information with a prospect. Using the Competitors screen, you can view comparisons about companies, products, and services, and also find literature to prepare for sales calls.

In competitive sales situations, it is imperative for the sales representative to have information about competitors to strengthen the sales strategy and differentiate the company's image and offerings.

### *To view competitor comparisons*

- 1 Navigate to the Competitors screen, then the Competitor List view.
- 2 Drill down on the Competitor field of a competitor record.
- 3 Navigate to the Account Comparisons view.

The Company Comparison, Competitor's Literature, and Comparative Literature lists appear.

- 4 In the Competitor's Literature list, select the literature item you want to view, and then drill down on the Name field.
- 5 In the Comparative Literature list, select the literature item you want to view, and then drill down on the Name field.



# 36 Decision Issues

This chapter describes how to use the Decision Issues view to associate customer questions and concerns with an opportunity. It includes the following topics:

- [About Decision Issues on page 401](#)
- [Scenario for Managing Decision Issues on page 401](#)
- [Creating Decision Issues on page 401](#)
- [Associating Decision Issues with an Opportunity \(End User\) on page 402](#)

## About Decision Issues

Decision issues are the criteria a prospective customer uses to evaluate a potential supplier and product before making a decision to buy.

Decision issues are specific areas of interest that can influence a prospect's buying decision. Customers and prospective customers can ask questions and express concerns about the solutions you propose, and your company in general, during the sales cycle. Decision issues provide you with an opportunity to develop a sales strategy and address customer concerns.

## Scenario for Managing Decision Issues

This topic gives one example of how decision issue management might be used. You might use decision issue management differently, depending on your business model.

A sales representative logs into the Siebel Sales application and discovers a new opportunity for a software module his company sells. The 2,500-seat opportunity has been qualified by a colleague in the Telesales department, and the sales representative wants to move forward with the opportunity. The sales representative reviews the list of contacts, and then calls the main prospect to introduce himself and gather some initial requirements. After this conversation, the sales representative adds two new decision issues which are important to this prospect (customer references and search engines in the software).

## Creating Decision Issues

Typically the administrator sets up the list of decision issues. Users associate these decision issues with other records, but cannot edit the decision issue text.

### *To create a decision issue*

- 1 Navigate to the Administration - Data screen, then the Decision Issues view.

- 2 Create a new record, and complete the necessary fields.
- 3 Navigate to the following views to add details to the decision record:
  - Related Issues view
  - Literature viewSelect the Auto Update check box if you want to update associated literature when source literature files are updated.
- Attachments view

## Associating Decision Issues with an Opportunity (End User)

After you qualify an opportunity, you can associate the related decision issues with the opportunity and rank the decision issues in order of importance to the prospect.

**NOTE:** Your application administrator enters decision issue data that has been defined in your company. For more information, see your application administrator.

### *To associate a decision issue with an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record associated with the decision issue.
- 3 Navigate to the Decision Issues view.
- 4 In the Decision Issues list, create a new record, and complete the necessary fields.

# 37 Enterprise Selling Process

This chapter describes how a sales professional can use Siebel Enterprise Selling Process (ESP) methodology from Siebel MultiChannel Services to penetrate, cover, and grow large strategic accounts (especially global accounts). It includes the following topics:

- [About Enterprise Selling Process on page 403](#)
- [About Using ESP Methodology to Manage Accounts on page 404](#)
- [Scenario for Managing Enterprise Selling Process on page 404](#)
- [Process of Managing Enterprise Selling Process on page 405](#)
- [Adding ESP Business Unit and Service Unit Information on page 406](#)
- [Adding ESP Business and Service Unit Offerings on page 407](#)
- [Conducting an ESP Organizational Analysis on page 408](#)
- [Charting the Organization's Reporting Structure on page 410](#)
- [Adding Partners for ESP Analysis on page 411](#)
- [Viewing the BU/SU Offering Summary on page 412](#)
- [Adding ESP Objectives on page 413](#)
- [Adding ESP Account Plan Highlights on page 414](#)
- [Viewing an ESP Manager's Review on page 414](#)

## About Enterprise Selling Process

Enterprise Selling Process is a separately licensed module that integrates with the Siebel Sales application.

The ESP module helps sales professionals identify the customer's business drivers and initiatives, uncover opportunities in key business and service units, develop global account strategies, manage key executive and partner relationships, and coordinate team activities.

The ESP module is designed to support users who are already familiar with the ESP methodology, which is based on the learning programs offered by Siebel MultiChannel Services. Users first complete an initial account analysis to select the units, opportunities, and partners, using the tools provided in the ESP workshop. After the analysis, the business units, opportunities, and partners are entered and tracked using the Siebel ESP module.

## About Using ESP Methodology to Manage Accounts

Siebel Enterprise Selling Process (ESP) software provides support for the Enterprise Selling Process methodology from Siebel MultiChannel Services. The software module allows account teams to better make use of the ESP account management methodology to penetrate, cover, and grow large strategic accounts (especially global accounts). Using the software, sales professionals can be more effective at identifying the customer's business drivers and initiatives, uncovering opportunities in key business and service units, developing global account strategies, managing key executive and partner relationships, and coordinating team activities.

The Siebel Enterprise Selling Process software module provides the following features:

- Support for the Enterprise Selling Process methodology
- An overview of Account Plan Highlights, such as the goal, the value proposition, and the critical success factors for driving business in the account
- A set of objectives for driving business in the account and an action plan for achieving each objective
- Analysis of the offerings that address each business and service unit's needs, along with the associated revenue from Installed Base, Current, and Potential Opportunities
- Automatic creation of an organization chart that visually shows an analysis of key players and their relationships
- Automatic creation of ESP reports including the Account Map and Account Plan

## Scenario for Managing Enterprise Selling Process

This topic gives one example of how ESP management might be used. You might use ESP management differently, depending on your business model.

An account manager has completed the ESP methodology workshop. At the end of the workshop, she develops a plan for her account. She plans to use the ESP software module to enter her account plan information to share with her team, and to track performance over the next several quarters against the plan.

The account manager begins by launching Siebel Sales and navigating to the Accounts screen. She selects the targeted account from the list of accounts, and then moves to the Enterprise Selling Process view to begin her account analysis.

First, the account manager enters the account's business and service units and key information about each unit such as the unit's culture, her company's level of relationship with the unit, and the strategy she plans to apply to the unit. Consequently, she provides her team with important sales information about each unit that sales team members plan to contact.

Then, the account manager enters information about the potential, current, and installed base opportunities by offering for each unit. This information helps the team understand where they have coverage and penetration in each unit and with which offerings. After the account's units and opportunities are mapped, the account manager analyzes the organizational structure within the account. The account manager defines both the formal and informal organizational structures and determines who is important within the account and whom the team must spend more time with to close the identified opportunities.

The account manager continues by analyzing the partners involved with this account so she can identify and use partnership capabilities within the key business and service units. The manager uses her analysis to enter her value proposition, goal, critical success factors and objectives for the account. She then enters activities that are necessary to meet each objective, and assigns objectives to the appropriate team member. Consequently, the account manager can coordinate with her team in a goal-oriented fashion.

When the account manager is ready to share her Account Plan, she runs the report and emails it to her team and manager. Her manager can also review the report online and enter her comments in the Manager's Review form.

## Process of Managing Enterprise Selling Process

The Enterprise Selling Process (ESP) module consists of eight views. Information provided in these views comprises the overall account plan. The ESP Account Plan and the ESP Account Map reports can be automatically generated from the ESP module. The tasks associated with the eight ESP views describe how to use the Enterprise Selling Process module.

To manage the Enterprise Selling Process, perform the following tasks:

- 1 "Adding ESP Business Unit and Service Unit Information" on page 406
- 2 "Adding ESP Business and Service Unit Offerings" on page 407
- 3 "Conducting an ESP Organizational Analysis" on page 408 and "Charting the Organization's Reporting Structure" on page 410
- 4 "Adding Partners for ESP Analysis" on page 411
- 5 "Viewing the BU/SU Offering Summary" on page 412
- 6 "Adding ESP Objectives" on page 413
- 7 "Adding ESP Account Plan Highlights" on page 414
- 8 "Viewing an ESP Manager's Review" on page 414

While you are in a view, click Reports in the toolbar to access the available preconfigured reports for the data in that view. For more information about reports, see *Siebel Reports Guide*.

## Adding ESP Business Unit and Service Unit Information

The Business Unit and Service Unit (BU/SU) Overview helps you segment the account into more manageable business and service units. Each business or service unit in your account has different characteristics that affect your ability to sell into the unit. This view helps you profile each unit to determine these characteristics. It also helps you to make decisions about where to apply your resources and how to successfully integrate into the organization.

This task is a step in ["Process of Managing Enterprise Selling Process" on page 405](#).

### To add BU/SU overview information

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the BU/SU Overview view.
- 4 In the list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                   | Comments                                                                                                                                                                                                |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business / Service Unit | Type a name for the business or service unit.                                                                                                                                                           |
| Culture                 | Select a value that defines the culture (sales environment and sales approach) favored by the business or service unit. Examples are Entrepreneurial, Individualistic, Bureaucratic, and Collaborative. |
| Strategy Type           | Select a value that defines your strategy to penetrate, cover and grow the relationship with the business or service unit. The values are Create, Exit, Expand, Protect, and Pursue.                    |
| Initiatives             | Type a description of the initiatives on which you plan to focus for the business or service unit. Example are improve ROI by 10% and increase customer satisfaction.                                   |
| Level of Relationship   | Select a value for your company's perception of its relationship with the business or service unit. Examples are Problem Solver, Trusted Advisor, and Credible Source.                                  |
| Marketing               | Type information about an existing marketing campaign or new marketing campaign that you want to apply or develop for this business or service unit.                                                    |

Field values are discussed during methodology training, and are available as part of the methodology documentation.

- 5 Repeat [Step 4](#) for each Business or Service Unit in the account.

**NOTE:** If you are using ESP to analyze an account that has associated child accounts, then the child accounts automatically appear in the BU/SU Overview list.

## Adding ESP Business and Service Unit Offerings

The Offerings view helps sales professionals to identify opportunities to sell their offerings (products and services) into key business or service units in the account. The sales professional can use this view to maintain a balance of current and future revenue in the account. It also helps to identify opportunities for greater account penetration.

This task is a step in ["Process of Managing Enterprise Selling Process"](#) on page 405.

### To add offerings

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the BU/SU Overview view.
- 4 Drill down on the Business/Service Unit field of the unit record to which you want to add offerings.

The name of the unit you drilled down on appears in the Account form at the top of the screen. The Offerings view appears. To add offerings, the Account Type must be ESP BSU. When the Account Type is set to ESP BSU, the icon to create a new record is inactive in the BU/SU Offering Summary view and in the Objectives view. This behavior is controlled by the business component user property Parent Read Only Field.

- 5 In the Offerings list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                   | Comments                                                                                                                                                                                                                                          |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Potential Oppty Name    | Select an existing opportunity. You can also create a new opportunity. A potential opportunity has long-term revenue implications and ties to the customer's business initiative. The opportunity can occur and can be classified as unqualified. |
| Potential Oppty Revenue | Type the revenue classified as Potential that is associated with the opportunity.<br><br><b>NOTE:</b> You can enter the revenue associated with potential opportunities without creating a new opportunity in the Siebel database.                |

| Field                 | Comments                                                                                                                                                                                                                                                                                                                             |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Current Oppty Name    | Select an existing opportunity. You can also create a new opportunity. A current opportunity is in the sales cycle and has a significant associated revenue or market value. The opportunity can be the result of a new or installed business.                                                                                       |
| Current Oppty Revenue | Type the revenue classified as Current that is associated with the opportunity.                                                                                                                                                                                                                                                      |
| Install Base Name     | Select an existing opportunity. You can also create a new opportunity. An installed base opportunity can be categorized in one or more of the following groups: <ul style="list-style-type: none"> <li>■ Servicing and maintaining</li> <li>■ Upgrades, add-ons</li> <li>■ Contract extensions</li> <li>■ Non-competitive</li> </ul> |
| Install Base Revenue  | Type the revenue classified as Install Base that is associated with the opportunity.                                                                                                                                                                                                                                                 |
| Value to Customer     | Select a numeric value to indicate your assessment of how critical the initiative is to the enterprise's overall strategy.                                                                                                                                                                                                           |
| Value to Us           | Select a numeric value after evaluating the following factors: <ul style="list-style-type: none"> <li>■ Short-term revenue potential</li> <li>■ Future revenue potential</li> <li>■ Profitability</li> <li>■ Degree of risk</li> <li>■ Strategic value</li> </ul>                                                                    |

- 6 When you have finished identifying opportunities in the unit for your offerings, navigate back to the BU/SU Overview view, select a new unit, and repeat [Step 4](#) and [Step 5](#).

## Conducting an ESP Organizational Analysis

Sales professionals conduct an ESP organizational analysis to identify the most influential people for an account or unit and to record information about managing relationships with these people.

This task is a step in [“Process of Managing Enterprise Selling Process”](#) on page 405.

### *To conduct an ESP organizational analysis*

- 1 Navigate to the Accounts screen, then the Accounts List view.



- 2 Drill down on the Name field of an account record.

- 3 Navigate to the Enterprise Selling Process view.

You can conduct an organizational analysis for an account or for a business or service unit.

- 4 If you want to conduct an organizational analysis for an account, then perform the following steps:

- a Navigate to the Organizational Analysis view.

The Organization Chart view appears showing any contacts associated with the account.

- b Proceed to [Step 6](#) of this procedure.

- 5 If you want to conduct an organizational analysis for a business or service unit, then perform the following steps:

- a Navigate to the BU/SU Overview view.

- b Drill down on the Business/Service Unit field of unit record for which you are conducting an organizational analysis.

The name of the unit appears in the Account form at the top of the screen, and the Offerings view automatically appears.

- c Navigate to the Organizational Analysis view.

The Organization Chart view appears showing any contacts associated with the unit.

- d Proceed to [Step 6](#) of this procedure.

- 6 From the drop-down list in the Organizational Analysis view, select Contacts to see the contacts for the account or unit, and complete the following steps:

- a (Optional) In the Contacts list, add a contact.

You can create a new contact record in the Add Contacts dialog box.

**NOTE:** You can also add a contact or create a new contact record in the Organization Chart view. If you create a new contact record in the Organization Chart view, then you must save the record to return to the Organization Chart view.

- b In the Contacts list, review and change the field values for each contact using the criteria in the ESP methodology training program.

The following table shows the shading that appears in the contact node in the organization chart for each value in the Level of Influence field.

| Field Value                  | Shading    |
|------------------------------|------------|
| Low                          | None       |
| Political Structure (Medium) | Light gray |
| Inner Circle (High)          | Dark gray  |

# Charting the Organization's Reporting Structure

After conducting an ESP organizational analysis, sales professionals can create organization charts that visually summarize the organization's reporting structure. Using the Organizational Analysis view, sales professionals can depict the structure and politics of the organization and then use this information to build and expand their relationship with the customer.

The organization chart displays nodes (boxes) that contain information for each of the contacts you analyze and associate with the account or unit. The node includes information about the contact, such as the contact's title, and other information from the organizational analysis.

This task is a step in ["Process of Managing Enterprise Selling Process" on page 405.](#)

## *To create the organization chart*

- 1 Navigate to the Organization Chart view.

For more information, see ["Conducting an ESP Organizational Analysis" on page 408.](#)

- 2 In the organization chart, click the white dot at the bottom of the node for a manager, and drag that dot to the white dot at the top of the node for the subordinate.

A line that reflects the reporting relationship between the contacts appears.

- 3 Repeat [Step 2](#) for each contact until you complete the organization chart.

**NOTE:** The reporting relationships are also stored in the Contacts list (toggle view). Information about the manager of the contact appears in the Manager Last Name field and Manager First Name field. Use the Columns Displayed option in the menu for the cogwheel icon to display these fields.

- 4 To delete a line that reflects a reporting relationship, click the line, and select Delete in the Actions list.
- 5 To delete a node from the organization chart, select Contacts from the drop-down list in the Organizational Analysis view, and delete the record for the contact.

## Using the Organization Chart to Draw Lines of Influence

You can track the political structure in the account or unit organization by identifying lines of influence between contacts. Tracking lines of influence helps you identify contacts who are not highly ranked (and are easier to access) but have significant influence on key decision makers.

Information about lines of influence is automatically updated in the Relationships view of the Contacts screen. You can add lines of influence in the Relationships view.

## *To draw lines of influence on the organization chart*

- 1 Navigate to the Organization Chart view.

For more information, see ["Conducting an ESP Organizational Analysis" on page 408.](#)

- 2 In the organization chart, click the blue dot at the side of the node for a contact, and drag that dot to the blue dot at the side of the node for another contact.

A line that reflects the influence between the contacts appears.

- 3 Repeat [Step 2](#) for each contact until you draw all lines of influence.
- 4 To delete a line that reflects an influence, click the line, and select Delete in the Actions list.

## Adding Partners for ESP Analysis

The Partners view helps you to analyze and execute key partnership strategies while identifying and using partnership capabilities across the enterprise. This view also helps you develop initiatives used to engage key partners.

This task is a step in ["Process of Managing Enterprise Selling Process" on page 405](#).

### *To add a partner*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the BU/SU Overview view.
- 4 Drill down on the Business/Service Unit field of the unit record to which to add partners.

The name of the unit appears in the Account form at the top of the screen. The Account Type must be ESP BSU to add partners to the unit.

The Offerings list appears below the Account form.

- 5 Navigate to the Partners view.
- 6 In the Partners view, create a new record, and complete the necessary fields.

**NOTE:** Partners are stored as Accounts in the Siebel database. The Partner flag is checked in the Add Accounts dialog box.

## Adding a Contact

Complete the following procedure to add a contact.

### *To add a contact*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the Partners view.
- 4 In the Partners list, select the partner, and drill down on the Name field.
- 5 In the Contacts list, perform one of the following steps:

- Add an existing contact, select the contact from the Add Contacts dialog box, and click OK.  
**NOTE:** You can select multiple contacts by holding down the SHIFT key and selecting multiple contacts.
- Create a new record in the Contacts list, and complete the necessary fields for the contact.

## Adding Activities

Complete the following procedure to add activities.

### *To add activities*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the Partners view.
- 4 In the Partners list, select the partner, and drill down on the Name field.
- 5 In the Contacts list, drill down on the Last Name field.  
The Contacts detail form and Activities view appears.
- 6 In the Activities list, create a new record, and complete the necessary fields.  
If you select Calendar and Activities in the Display In field, then you must specify a start date and time for the record to appear in the Calendar.  
To delegate the activity, select the owner of the activity in the Owner field. For more information, see [Chapter 15, "Activities."](#)

## Viewing the BU/SU Offering Summary

The BU/SU Offering Summary is a read-only view that allows you to see all the offerings (and associated opportunities) you have added to each business and service unit in the account.

**NOTE:** Verify that the account name in the Account form does not show one of your units. You must select the main account for which you are conducting the ESP analysis to see all the offerings by unit.

This task is a step in ["Process of Managing Enterprise Selling Process"](#) on page 405.

### *To view BU/SU offerings*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the BU/SU Offering Summary view.

The offerings associated with each unit in the account appear. You can also see the potential, current, and installed base opportunities for each offering associated with each unit.

## Adding ESP Objectives

The Objectives view helps the sales professional to develop an initial plan for the account. Sales professionals can create specific types of objectives (for example, Business Development, Revenue, and Cross-Account) for each unit or resource to improve strategic planning and account team coordination.

The defined objectives link to an Action Plan form that sales professionals can use to develop action plans to achieve each objective they set. Moreover, the sales professional can verify that the action plan is implemented, because the activities assigned in the Action Plan form automatically appear in the assignee's activities list.

This task is a step in ["Process of Managing Enterprise Selling Process" on page 405.](#)

### To add objectives

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the Objectives view.
- 4 In the list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field            | Comments                                                                                                                                                                                                                                 |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Unit or Resource | Type the unit or resource for which you are creating the objective. Units can be a business or service unit, opportunities, offerings, or groups of units. Examples of resource names are Marketing, Customer Satisfaction, or Partners. |
| Objective Type   | Select the type of objective. Select from the Cross Account, Revenue, and Business Development objective types.                                                                                                                          |
| Objective        | Type the objective for the unit or resource.                                                                                                                                                                                             |
| Strategy         | Type a statement explaining how to achieve the objective.                                                                                                                                                                                |

- 5 Drill down on the Unit or Resource field.

The Objective details form appears with the Action Plan list.

- 6 In the Action Plan list, create a new record, and complete the necessary fields.

The Actions you create in the Action Plan list appear in your Activities, Calendar, and To Do List. The Display In value that you select determines the actions that appear. To appear in the Calendar, the start date for the action must be entered.

## Adding ESP Account Plan Highlights

The Account Plan Highlights view allows the sales professional to enter the achievement goals for the account. The sales professional can communicate the strategic plans for the account to the sales team and to sales management, using the following fields:

- **Goal.** The account goal is a statement that describes the level of business you want with the customer within the next few years. Express the goal, if possible, in terms of relationship and revenue.
- **Value Proposition.** The value proposition is a statement that describes your value to the customer. The value proposition is written from the perspective of the customer.
- **Critical Success Factor.** Specific to the ESP Account Plan, critical success factors are the events or resources necessary to the success of your plan.

This task is a step in ["Process of Managing Enterprise Selling Process" on page 405.](#)

### *To add account plan highlights*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.
- 3 Navigate to the Enterprise Selling Process view, then the Account Plan Highlights view.
- 4 In the forms, complete the necessary fields.

Some fields are described in the following table.

| Field                    | Comments                                                                |
|--------------------------|-------------------------------------------------------------------------|
| Goal                     | Type text describing the goal of the account plan.                      |
| Value Proposition        | Type text describing the value proposition for the account plan.        |
| Critical Success Factors | Type text describing the critical success factors for the account plan. |

## Viewing an ESP Manager's Review

The sales manager uses the Manager's Review view to enter an assessment of the sales professional's ESP account plan. The manager can add comments in the Manager's Review, which includes the date of each review.

The sales representative and other nonmanagers have read-only access to this view.

This task is a step in ["Process of Managing Enterprise Selling Process" on page 405.](#)

### *To view a manager's review*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the Name field of an account record.

- 3 Navigate to the Enterprise Selling Process view, then the Manager's Review view.





# 38 Target Account Selling

This chapter describes how sales professionals can use Target Account Selling (TAS) methodology from Siebel MultiChannel Services to help win deals. It includes the following topics:

- [About Using Target Account Selling to Manage Opportunities on page 417](#)
- [Scenarios for Managing Target Account Selling on page 418](#)
- [Process of Managing Target Account Selling on page 419](#)
- [Completing a TAS Overview on page 420](#)
- [Assessing an Opportunity on page 422](#)
- [Developing Strategy with TAS Competitive Analysis on page 423](#)
- [Conducting a TAS Organizational Analysis on page 423](#)
- [Mapping the Organization's Reporting Structure on page 424](#)
- [Developing a Relationship Strategy on page 425](#)
- [Adding Customer Milestones on page 426](#)
- [Viewing PRIME Activities on page 428](#)
- [Adding Notes to Opportunities on page 428](#)

## About Using Target Account Selling to Manage Opportunities

Target Account Selling is a separately licensed module that integrates with the Siebel Sales application.

The Target Account Selling module provides full support for the Target Account Selling (TAS) sales methodology. Using the Target Account Selling methodology and the Target Account Selling module, sales professionals can perform the following functions:

- Assess opportunities, relationships with key customer contacts, and their competitive position.
- Develop competitive and relationship strategies to win the deal.
- Execute the strategy and track progress against the action plan.

The Siebel Target Account Selling software module provides the following features:

- Full support for the Target Account Selling methodology
- Automatic creation of the organization map that allows you to view both the formal hierarchy and lines of influence in the customer organization and that helps sales professionals develop relationship strategy.

- Support in identifying and ranking the decision criteria of each contact
- Team planning to make sure that key Customer Milestones are addressed
- Automatic creation of the TAS Opportunity Plan. The report can be configured to print selected sections.
- Automatic creation of the TAS Initial Plan
- The TAS Opportunity Plan template that generates an editable Microsoft Word file (available to customers who have the separately licensed Proposal Generator)

## Scenarios for Managing Target Account Selling

This topic describes how Target Account Selling (TAS) management might be used. You might use TAS management differently, depending on your business model. This topic includes the following scenarios:

- [“Assessing Opportunities” on page 418](#)
- [“Developing Competitive and Relationship Strategies” on page 419](#)
- [“Executing Strategies” on page 419](#)

### Assessing Opportunities

A sales representative meets with a customer and discovers a new opportunity. The sales representative plans to use the Target Account Selling (TAS) methodology from Siebel MultiChannel Services (MCS) to develop a sales strategy for this new deal. TAS is supported by her Siebel Sales application, allowing the sales representative to analyze the opportunity and its multiple decision makers.

The sales representative selects the opportunity within Siebel Sales, and navigates to the Target Account Selling views to begin the process. She sees several views that she can use to profile and assess the opportunity, develop her value proposition and competitive strategy, and create a detailed action plan to achieve her goals.

She begins by developing an overview of the opportunity. She enters some high-level information, including a profile of the account and the opportunity. This information provides strategic insight that her sales team can use and helps her to connect the project to the customer's business drivers. The sales representative also enters details about her goal for the opportunity, the solution she is offering, and the business value this solution provides. She continues by entering a description of the compelling event that is causing the customer to act to help her determine the customer's sense of urgency to close the deal. She concludes by summarizing her high-level strengths and weaknesses for the deal.

Now that she has a general overview of the opportunity, she begins to assess her position using the TAS criteria that Siebel MCS has developed from analyzing the best practices of top sales professionals. She also rates the position of her key competitors using these criteria.

## Developing Competitive and Relationship Strategies

Next, the sales representative begins to analyze her competitors for the opportunity and to determine the strategy to use to win the deal.

She continues by analyzing the prospect's organization. She maps both the formal and informal structures so that she can be sure she is spending time with the right contacts. When she completes the analysis, she views the organization map that summarizes her assessment and identifies key players and relationships she can use to close the deal.

Now that she knows who to talk to, the sales representative begins to develop a relationship strategy. She enters the business and personal agenda, as well as key decision issues, for each contact. This preparation helps her to determine the message to deliver to each contact.

## Executing Strategies

The sales representative is now prepared to develop her action plan to win the opportunity. First, she navigates to the Customer Milestones view to document key events or milestones in the customer's buying process. This view helps her plan the activities that she and her sales team will take to address the customer's requirements at each milestone. Then, she enters key action steps and resources needed and assigns the actions to members of her sales team. She can choose to have the activities appear in her calendar, activities, or To Do list, or in those of another assignee. She navigates to the PRIME Activities view where she can see all the activities she created to meet customer milestones, and add action items required to win the deal. She also makes some additional notes about the opportunity and makes the notes available for the entire team to view.

The sales representative's manager requests a copy of the TAS Opportunity Plan. The sales representative configures the report to display relevant sections of the Opportunity Plan, generates the report, and then emails it to her manager.

# Process of Managing Target Account Selling

Siebel Target Account Selling (TAS) consists of eight views that automate the steps in the TAS methodology. The TAS Initial Plan report and the TAS Opportunity Plan report can be generated from the TAS module.

The TAS Opportunity Plan template is available with Siebel Proposal Generator (a separately licensed module), which automatically creates the Opportunity Plan using Microsoft Word. The tasks associated with the Target Account Selling views describe how to use the Target Account Selling module.

To manage Target Account Selling, perform the following tasks:

- 1 "Completing a TAS Overview" on page 420
- 2 "Assessing an Opportunity" on page 422
- 3 "Developing Strategy with TAS Competitive Analysis" on page 423
- 4 "Conducting a TAS Organizational Analysis" on page 423

- 5 [“Mapping the Organization’s Reporting Structure” on page 424](#)
- 6 [“Developing a Relationship Strategy” on page 425](#)
- 7 [“Adding Customer Milestones” on page 426](#)
- 8 [“Viewing PRIME Activities” on page 428](#)
- 9 [“Adding Notes to Opportunities” on page 428](#)

While you are in a view, click Reports in the toolbar to access the available preconfigured reports for the data in that view. For more information about reports, see *Siebel Reports Guide*.

## Completing a TAS Overview

The Overview view provides a starting point that sales professionals can use to consolidate their observations about the account and opportunity and share strategic insights with their sales teams.

Using this view, sales professionals can profile their customers’ important business initiatives and requirements. In addition, sales professionals can summarize the strategic goal, value proposition, and overall position.

This task is a step in [“Process of Managing Target Account Selling” on page 419](#).

### To complete a TAS overview

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on Opportunity Name field of an opportunity record.
- 3 Navigate to the Target Account Selling view.
- 4 In the first form, complete the necessary fields.

You can position the pointer on the information icon to see information about the view.

Some fields are described in the following table.

| Field                       | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Customer’s Business Profile | <p>Type a description of the customer’s business conditions. Identify the customer’s major lines of business, affiliations, products, and markets. Include information about recent mergers and acquisitions.</p> <p><b>NOTE:</b> If this opportunity is a new opportunity, then you must create a new record and associate it with an account before you can enter text in the Customer’s Business Profile field. For more information, see <a href="#">Chapter 30, “Opportunity Workflows.”</a></p> |
| Customer’s Revenue          | Type the customer’s annual revenues or sales.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

| Field             | Comments                                                                          |
|-------------------|-----------------------------------------------------------------------------------|
| Fiscal Year End   | Select the month and day in which the customer's 12-month accounting period ends. |
| Customer's Profit | Type the customer's annual profit.                                                |

**5** In the Overview form, complete the necessary fields.

Some fields are described in the following table.

| Field                       | Comments                                                                                                                                                                                                                                                                                                    |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunity Profile         | Type a description of the customer's project or application. Identify the customer's business objectives for the project, the total cost and budget for the project, and how the project affects the customer's overall business.                                                                           |
| Customer's Compelling Event | Type a description of the driving influence for the customer to make a decision or change the current situation. Identify the payback if the customer makes a change, or the consequences if the customer does not act. Note the specific date associated with the consequences or payback.                 |
| Critical Success Factors    | Type the actions you, the competition, and your customer must complete for you to win this opportunity.                                                                                                                                                                                                     |
| Our Strengths               | Type the business, organizational, and political issues that give your sales team an advantage in the deal.                                                                                                                                                                                                 |
| Goal                        | Type a description of your projected, long-term position with the customer. Identify how a closer relationship with you advances the attainment of their business goals. Include the long-term gain for your business such as future or strategic value.                                                    |
| Our Solution                | Type a description of the solution you plan to offer to the customer. Address how the solution works in the customer's environment and how it meets their compelling event. Include any alliances or business partner solutions required to make it operational for the customer.                           |
| Our Weaknesses              | Type the business, organizational, and political issues that might put your sales team at risk in the deal.                                                                                                                                                                                                 |
| Our Unique Business Value   | Type a description of your value proposition. Make sure it is specific to this customer, defines a measurable business result, and creates credibility by proving your ability to deliver. The value proposition differentiates you from your competitors. Confirm the value proposition with the customer. |

## Assessing an Opportunity

Sales professionals can use the Assessments view to evaluate the opportunity using criteria developed by Siebel MultiChannel Services. Assessments must be completed before determining the best strategy. An assessment focuses on the following four key questions:

- Is there an opportunity?
- Can we compete?
- Can we win?
- Is it worth winning?

Sales professionals assess their organization's position and the position of their top competitors against these criteria. As the sales campaign progresses, sales professionals repeat this assessment and then compare the results to past assessments to evaluate and monitor their position at each sales stage.

After some assessments are performed and you are familiar with the criteria and methodology, use the Assessments form to rate the criteria.

This task is a step in ["Process of Managing Target Account Selling" on page 419.](#)

### *To begin an assessment*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record that you want to assess.
- 3 Navigate to the Target Account Selling view, then the Assessments view.

The Assessments list includes all the assessments you and your sales team have performed to date. Use the Assessments list to compare opportunity assessments for your company and your competitors.

- 4 In the Assessments form, create a new record.  
In the new record, the Assessment For field defaults to Our Company for self assessments.
- 5 If you are assessing a competitor's position, then specify the competitor in the Assessment For field.
- 6 In the Assessments form, complete the assessment criteria questions.

## Developing Strategy with TAS Competitive Analysis

The Competitive Analysis view helps sales professionals to develop competitive strategy. For each competitor, the sales team can evaluate strengths and weaknesses and anticipate the competitor's strategy. The view also help the sales team to assess its own position against the competitor and to refine its strategy to win the deal.

**NOTE:** If you are analyzing a competitor's strategy, then enter the information in the Competitors list.

When you determine your strategy, enter a summary in the Our Competitive Strategy text field in the Competitive Analysis view.

This task is a step in ["Process of Managing Target Account Selling" on page 419](#).

### *To add competitive analysis information*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record.
- 3 Navigate to the Target Account Selling view, then the Competitive Analysis view.
- 4 In the Competitors list, create a new record, and complete the necessary fields.

After you have analyzed your competitors, you determine your strategy in the deal. Evaluate the anticipated action of your competitor to enter your strategy in the Our Competitive Strategy field.

## Conducting a TAS Organizational Analysis

Sales professionals conduct a TAS organizational analysis to identify the most influential people for an opportunity and to record information about managing relationships with these people.

This task is a step in ["Process of Managing Target Account Selling" on page 419](#).

### *To conduct a TAS organizational analysis*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record.
- 3 Navigate to the Target Account Selling view, then the Organizational Analysis view.

The Organization Map view appears showing any contacts associated with the opportunity.

- 4 From the drop-down list in the Organizational Analysis view, select Contacts.

The contacts for the opportunity appear.

- 5 (Optional) In the Contacts list, add a contact.

You can create a new contact record in the Add Contacts dialog box.

**NOTE:** You can also add a contact or create a new contact in the Organization Map view. If you create a new contact record in the Organization Map view, then you must save the record to return to the Organization Map view.

- 6 In the Contacts list, review and change the field values for each contact using the criteria in the TAS methodology training program.

The following table shows the shading that appears in the contact node in the organization map for each value in the Type of Influence field.

| Field Value                  | Shading    |
|------------------------------|------------|
| Low                          | None       |
| Political Structure (Medium) | Light gray |
| Inner Circle (High)          | Dark gray  |

## Mapping the Organization's Reporting Structure

After conducting a TAS organizational analysis, sales professionals can create organization maps that visually summarize the organization's reporting structure. Using the Organizational Analysis view, sales professionals can depict the structure and politics of the organization and then use this information to build and expand their relationship with the customer.

The organization map displays the nodes (boxes) containing information for each of the contacts you analyze and associate with the opportunity. The node includes information about the contact, such as the contact's title and other information from the organizational analysis.

This task is a step in ["Process of Managing Target Account Selling" on page 419](#).

### *To create the organization map*

- 1 Navigate to the Organization Map view.

For more information, see ["Conducting a TAS Organizational Analysis" on page 423](#).

- 2 In the organization map, click the white dot at the bottom of the node for a manager, and drag that dot to the white dot at the top of the node for the subordinate.

A line that reflects the reporting relationship between the contacts appears.

- 3 Repeat [Step 2](#) for each contact until you complete the organization map.

**NOTE:** The reporting relationships are also stored in the Contacts list (toggle view). Information about the manager of the contact appears in the Manager Last Name field and Manager First Name field. Use the Columns Displayed option in the menu for the cogwheel icon to display these fields.



- 4 To delete a line that reflects a reporting relationship, click the line, and select Delete in the Actions list.
- 5 To delete a node from the organization map, select Contacts from the drop-down list in the Organizational Analysis view, and delete the record for the contact.

## Using the Organization Map to Draw Lines of Influence

You can track the political structure in a customer organization by identifying lines of influence between contacts. Tracking lines of influence helps you identify contacts who are not highly ranked (and are easier to access) but have significant influence on key decision makers.

Information about lines of influence is automatically updated in the Relationships view of the Contacts screen. You can indicate lines of influence in the Relationships view.

### *To draw lines of influence on the organization map*

- 1 Navigate to the Organization Map view.  
For more information, see [“Conducting a TAS Organizational Analysis” on page 423](#).
- 2 In the organization map, click the blue dot at the side of the node for a contact, and drag that dot to the blue dot at the side of the node for another contact.  
A line that reflects the influence between the contacts appears.
- 3 Repeat [Step 2](#) for each contact until you draw all lines of influence.
- 4 To delete a line that reflects an influence, click the line, and select Delete in the Actions list.

## Developing a Relationship Strategy

Information captured in the Relationship Strategy view helps sales professionals develop a relationship strategy for each of the key players for an opportunity. The view allows sales teams to share their understanding of the business and personal decision issues for each contact.

This task is a step in [“Process of Managing Target Account Selling” on page 419](#).

### *To add relationship strategy information*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record.
- 3 Navigate to the Target Account Selling view, then the Relationship Strategy view.
- 4 In the Contacts list, create a new record, and complete the following steps:
  - a From the Add Contacts dialog box, select the contact or contacts you want to add, and click OK.

**NOTE:** All contacts added in the organization map automatically appear in the Contacts list, and all contacts added in the Contacts list appear in the organization map.

- b** Complete the Business Agenda, Personal Agenda and Relationship Strategy fields for each contact.

You complete this information only for the key players in the organization. Role, level of influence, and rank determine the key players in the organization.

- 5** Add decision criteria by completing the following steps:

- a** In the Relationship Strategy list, select a contact.
- b** In the Decision Criteria list, create a new record, and complete the necessary fields.

**NOTE:** The administrator might want to create a Custom record that users can select from the list of decision criteria. This record can be used to track issues that are unique to the contact and do not already exist in the Siebel database.

## Adding Customer Milestones

Milestones are formal steps in the customer's buying process. The Customer Milestones view helps sales professionals identify and track customer requirements that must be met as the sales cycle progresses. After the milestones are set, use the Our Activities list to target specific activities to accomplish to meet each milestone. These activities might include formal presentations, product demonstrations, benchmarks, proposals, and other activities required to make the sale.

Milestones are similar to Activity Plan templates that are created with predefined activities. For example, the initial milestone, Request Offering, is associated with recommended activities to be performed by you and your sales team. These activities might include understanding the problem or opportunity, defining the customer's Compelling Event and confirming the budget, completing an opportunity assessment, and developing an organization map for the customer's business.

A sample of customer milestone types is included with the Siebel Sales application. Your administrator can change the milestones to suit your business needs. You and your sales team can create, edit and delete activities associated with the milestones that address the opportunity.

This task is a step in ["Process of Managing Target Account Selling" on page 419](#).

### To add a milestone

- 1** Navigate to the Opportunities screen, then the Opportunities List view.
- 2** Drill down on the Opportunity Name field of an opportunity record.
- 3** Navigate to the Target Account Selling view, then the Customer Milestones view.

- 4 In the Customer Milestones list, create a new record, and complete the necessary fields. Some fields are described in the following table.

| Field                   | Comments                                                                                                                                                         |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Event                   | Select the type of event.<br><br>A set of suggested activities appears in the Our Activities list. You must save the type of event for the activities to appear. |
| Description             | Type a description of the milestone event.                                                                                                                       |
| Customer Responsibility | Select the customer contact who is the key contact and owner of the milestone event.                                                                             |

- 5 Repeat [Step 4](#) until you have entered all key milestone events.  
Review the recommended activities for each milestone before adding new milestones.

## Adding Associated Activities to Each Milestone

Complete the following procedure to add associated activities to each milestone.

### *To add associated activities to each milestone*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record.
- 3 Navigate to the Target Account Selling view, then the Customer Milestones view.
- 4 In the Customer Milestones list, select a milestone record.
- 5 In the Our Activities list, create a new activity record, and complete the necessary fields. Some fields are described in the following table.

| Field      | Comments                                                                                                                                                                                                           |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type       | Select the activity type.                                                                                                                                                                                          |
| Resources  | Type a description of the resources required to support the activity.                                                                                                                                              |
| Owner      | Select a new owner of the activity, if necessary. Your user ID appears in this field by default.                                                                                                                   |
| In Display | Select a value to indicate where you want the activity to appear. If you select Calendar and Activity as the display method, then you must enter a start date for the activity so that it appears in the calendar. |

## Viewing PRIME Activities

The PRIME Activities view helps sales professionals develop the necessary action steps to execute the strategy and win the opportunity. The PRIME acronym underscores the initiatives that are used:

- Prove your value.
- Retrieve missing information.
- Insulate against competition.
- Minimize your weaknesses.
- Emphasize your strengths.

These activities can be assigned with due dates to members of the sales team and automatically appear in individual calendars and activity lists. Use this view to update the entire sales team, and to measure progress while implementing the sales strategy.

All the activities created in the PRIME Activities view automatically appear in the Activities view associated with the opportunity. Your sales organization might want to standardize on one of these views.

Activities created in the Our Activities list in the Milestones view also appear in the PRIME Activities list, providing a method for tracking. (In the Customer Milestones list, you must select the milestone to see the associated activities.)

Using this view, you can create activities that are not specific to milestones, such as follow-up actions associated with assessments and the organizational analysis.

This task is a step in [“Process of Managing Target Account Selling” on page 419](#).

### **To add PRIME activities**

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the Opportunity Name field of an opportunity record.
- 3 Navigate to the Target Account Selling view, then the PRIME Activities view.
- 4 In the list, create a new record, and complete the necessary fields.

Identify the actions and resources required to implement your strategy, and then select a member of your sales team who is responsible for the activity.

## Adding Notes to Opportunities

The Notes view consolidates comments (for example, notes and directions) created by various members of the sales team. These notes can be marked for general viewing or can be kept private. The Notes view allows the sales team to aggregate and track observations about the opportunity throughout the sales process.

This task is a step in [“Process of Managing Target Account Selling” on page 419](#).

**To add a note**

- 1** Navigate to the Opportunities screen, then the Opportunities List view.
- 2** Drill down on the Opportunity Name field of an opportunity record.
- 3** Navigate to the Notes view, then the Public Notes view or Private Notes view.
- 4** In the Notes view, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                             |
|-------------|------------------------------------------------------|
| Description | Type the text for the note.                          |
| Created     | Displays the date and time that you create the note. |



# 39 Managing Portfolios

This chapter describes how a portfolio manager can use the Portfolio Management Process (PMP) methodology in Siebel Business Applications to manage accounts and complex relationships with customers and partners. It includes the following topics:

- [About the Portfolio Management Process on page 431](#)
- [Scenario for Managing a Portfolio on page 432](#)
- [Roadmap for Managing Portfolios on page 433](#)
- [Creating a Portfolio Plan on page 433](#)
- [Process of Segmenting Accounts on page 435](#)
- [Process of Analyzing the A Accounts on page 437](#)
- [Process of Analyzing B, C, and D Accounts on page 438](#)
- [Performing a Manager Review of a Portfolio Plan on page 445](#)
- [Adding Solutions to Portfolio Plans on page 446](#)

## About the Portfolio Management Process

PMP is an account-based, structured methodology for sales professionals who manage a portfolio of accounts, and who must be responsible for, penetrate, retain, and grow those accounts. A portfolio contains a set of accounts organized by industry application, geographic location, and so on. Typically, a *portfolio* contains strategically important accounts that represent high-potential business for the sales organization.

PMP is designed to help portfolio managers perform the following activities:

- Analyze accounts in their portfolio to reveal the accounts with highest revenue potential.
- Engage the high-potential accounts in their portfolio.
- Direct and manage resources to close as much business as possible.
- Manage complex relationships with customers and partners.

PMP separates a group of accounts into four segments. [Table 85](#) shows these segmentation groups.

Table 85. Segmentation Groups in Portfolio Management Process

| Group | Comments                                                                               |
|-------|----------------------------------------------------------------------------------------|
| A     | Accounts that offer significant sales potential and deserve significant sales effort.  |
| B     | Accounts that make a significant current revenue contribution and are meeting targets. |

Table 85. Segmentation Groups in Portfolio Management Process

| Group | Comments                                                                                                          |
|-------|-------------------------------------------------------------------------------------------------------------------|
| C     | Accounts that are valued, but do not make a significant contribution and offer limited future potential.          |
| D     | Accounts that have little or no revenue potential today. Insufficient data exists to accurately assess potential. |

PMP plots the accounts in each group on a segmentation map. Each quadrant corresponds to an A, B, or C segment. PMP plots the D segment separately.

The PMP methodology is integrated with Siebel Business Applications. The PMP methodology integrated in Siebel Business Applications is licensed from, and is the intellectual property of, The TAS Group.

## Scenario for Managing a Portfolio

This topic gives one example of how portfolio management might be used. You might use portfolio management differently, depending on your business model.

A portfolio manager has ten accounts and must analyze the accounts, and decide how best to focus the resources.

The portfolio manager logs in to Siebel Sales and navigates to the Portfolio Management Process view. The manager creates a new portfolio plan. A portfolio plan is the means by which portfolio managers capture their intentions about how to drive revenue from a portfolio.

The manager adds ten accounts to the plan, and then performs the following tasks to segment the accounts:

- 1 Assesses current revenue.** The portfolio manager enters the period for which she wants to assess the revenue for the account. The revenue for this period appears in the Siebel application, separated into closed and committed revenue.

The portfolio manager then selects a current revenue breakpoint. This breakpoint determines which accounts are considered to be more significant from a revenue point of view. This breakpoint also determines which accounts appear in the left and right halves of the segmentation map.

- 2 Assesses future potential.** For each account, the portfolio manager enters a score against a set of criteria. The Siebel application then uses the scores that portfolio manager enters to calculate a future potential score for each account.

The portfolio manager then selects a future potential breakpoint. This breakpoint determines which accounts are considered to be more significant from a future potential point of view. This breakpoint also determines which accounts appear in the top and bottom halves of the segmentation map.

For each account, the Siebel application takes the current revenue value and the future potential score and plots the account on the portfolio segmentation map. The breakpoints segment the accounts into A, B, C, and D accounts.



Next, the portfolio managers analyze each of the A accounts. They review the business units and service units (BU/SU) for each account to make sure that all of the units are included. They then segment the units. To segment the units, they assign each unit scores to reflect the importance of the unit to the portfolio managers, and to the customers. The Siebel application uses these scores to plot a BU/SU segmentation map.

The portfolio managers then review the BU/SU segmentation map and select the units where they want to identify the potential opportunities. For each selected unit, they analyze the business drivers, related initiatives, and critical success factors.

Next, the portfolio managers review and update more information to complete the A account analysis. They also review and update the equivalent information for the B, C, and D accounts to complete the analysis of the B, C, and D accounts.

The information that the portfolio managers review and update for all the account groups includes:

- Current and installed base opportunities
- Organizational structure
- Marketing plan information
- Partner information
- Objective strategy and action plan information

The portfolio manager can view the portfolio segmentation map. The manager of the portfolio manager can now review the portfolio plan and approve the plan.

## Roadmap for Managing Portfolios

To manage portfolios, perform the following processes and tasks:

- 1 [“Creating a Portfolio Plan” on page 433](#)
- 2 [“Process of Segmenting Accounts” on page 435](#)
- 3 [“Process of Analyzing the A Accounts” on page 437](#)
- 4 [“Process of Analyzing B, C, and D Accounts” on page 438](#)
- 5 [“Performing a Manager Review of a Portfolio Plan” on page 445](#)
- 6 [“Adding Solutions to Portfolio Plans” on page 446](#)

## Creating a Portfolio Plan

You can create a portfolio plan to group your accounts together.

This task is a step in [“Roadmap for Managing Portfolios” on page 433](#).

### *To create a portfolio plan*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.

- 2 In the portfolio plan list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                   | Comments                                                                                                         |
|-------------------------|------------------------------------------------------------------------------------------------------------------|
| Portfolio Name          | Type a unique name for the portfolio plan.                                                                       |
| Status                  | Select the status of the portfolio plan from the drop-down list.                                                 |
| Period From             | Select the start date of the period for which the plan is active.                                                |
| Period To               | Select the end date of the period for which the plan is active.                                                  |
| Completion Date         | Select the date by which the portfolio plan is due to be completed.                                              |
| Next Review Date        | Select the date of the next management review between the portfolio manager and the portfolio manager's manager. |
| Currency Code           | Select the currency to use for revenue amounts for the portfolio plan.                                           |
| Owner                   | Select the owner of the portfolio plan.                                                                          |
| Portfolio Plan Goal     | Type the goals for the portfolio plan.                                                                           |
| Critical Success Factor | Type the factors that are important for the success of the portfolio plan.                                       |

- 3 Drill down on the Portfolio Name field of a portfolio plan record to see more fields.

Some fields are described in the following table.

| Field                    | Comments                                                                                                                                                                                                                                                                       |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Revenue Calculation | Displays the date of the most recent revenue calculation.                                                                                                                                                                                                                      |
| Revenue Assessment From  | Select the start date of the period for which you want to analyze revenue.                                                                                                                                                                                                     |
| Revenue Assessment To    | Select the end date of the period for which you want to analyze revenue.                                                                                                                                                                                                       |
| Revenue Benchmark        | Select the amount of the total current revenue. This value determines which accounts are considered to be more significant and less significant. It also determines which accounts appear on the left side of the segmentation map and the right side of the segmentation map. |
| A Account Breakpoint     | Select the future potential score. This score determines which accounts are considered to be more significant and less significant. It also determines which accounts appear on the top half of the segmentation map and the bottom half of the segmentation map.              |

- 4 To add accounts to the portfolio plan, perform the following steps:

- a** Navigate to the Segmentation view, then the Revenue Assessment view.
- b** Create a new record, and select an account in the Account field.

The other fields are automatically populated.

While you are in a view, click Reports in the toolbar to access the available preconfigured reports for the data in that view. For more information about reports, see *Siebel Reports Guide*.

## Process of Segmenting Accounts

To segment accounts, perform the following tasks:

- 1** [“Assessing Current Revenues” on page 435](#)
- 2** [“Assessing the Future Potential of Accounts” on page 436](#)
- 3** [“Viewing the Portfolio Segmentation Map” on page 437](#)

This process is a step in [“Roadmap for Managing Portfolios” on page 433](#).

### Assessing Current Revenues

To assess the current revenue of your accounts, you must review the current closed and committed revenue, then choose a benchmark that determines which accounts are more significant from a revenue perspective.

This task is a step in [“Process of Segmenting Accounts” on page 435](#).

#### ***To assess the current revenue of an account***

- 1** Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2** Drill down on the Portfolio Name field of the portfolio plan record.
- 3** Enter the period for which you want to analyze the revenue in the Revenue Assessment From and Revenue Assessment To fields.
- 4** Navigate to the Segmentation view, then the Revenue Assessment view.

**5** Click Calculate Revenues.

The revenues for each account appear in the Segmentation view.

Some fields are described in the following table.

| Field                 | Comments                                                                                                                                                                                                                                     |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Closed Revenue        | Displays the aggregate revenue from opportunities with a Sales Stage value of 09 - Closed/Won, for the time period specified in <a href="#">Step 3</a> .                                                                                     |
| Committed Revenue     | Displays the revenue from the opportunities where the Sales Stage value is not 09 - Closed/Won or 09 - Closed/Lost, and where the PMP Revenue Type is set to Installed Base or Current, for the period specified in <a href="#">Step 3</a> . |
| Total Current Revenue | Displays the sum of the Closed Revenue and Committed Revenue fields.                                                                                                                                                                         |

You can add more accounts to the portfolio. For information about how to add accounts to a portfolio, see ["Creating a Portfolio Plan" on page 433](#).

**6** Select a current revenue value that separates the high-revenue accounts from the low-revenue accounts in the Revenue Benchmark field.

## Assessing the Future Potential of Accounts

To assess the future potential of your accounts, you must assign scores for numerous criteria for the account. The future potential score for the account is calculated from the scores for the criteria.

This task is a step in ["Process of Segmenting Accounts" on page 435](#).

### *To assess the future potential of an account*

- 1** Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2** Drill down on the Portfolio Name field of the portfolio plan record.
- 3** Navigate to the Segmentation view, then the Account Assessment view.
- 4** Select the account that you want to assess.

- 5 In the Criteria list, use the drop-down lists to assign a value to each of the criteria.

The values are described in the following table.

| Value | Description |
|-------|-------------|
| 1     | High        |
| 0     | Low         |
| ?     | Unknown     |

The future potential score for the account is automatically calculated and appears in the list of accounts.

- 6 Repeat [Step 4](#) and [Step 5](#) for all the other accounts that have future potential you want to assess.
- 7 In the Account Breakpoint field, select a score that separates the accounts with a high-future potential score from the accounts with a low-future potential score.

## Viewing the Portfolio Segmentation Map

After you assess the current revenue and future potential of your accounts, the Siebel application plots the results on a segmentation map. Use the segmentation map to decide how to allocate your sales resources.

This task is a step in [“Process of Segmenting Accounts”](#) on page 435.

### *To view the segmentation map of a portfolio*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the Segmentation view, then the Map view.

## Process of Analyzing the A Accounts

To analyze the A accounts, perform the following tasks:

- 1 [“Entering Details of the Account”](#) on page 438
- 2 [“Assessing Business Units and Service Units”](#) on page 439
- 3 [“Analyzing Selected Units”](#) on page 440
- 4 [“Reviewing Opportunities”](#) on page 441
- 5 [“Reviewing Organizational Analysis”](#) on page 441
- 6 [“Reviewing Marketing Events”](#) on page 442
- 7 [“Reviewing Partners”](#) on page 443

8 “Reviewing Objectives and Action Plans” on page 444

This process is a step in “Roadmap for Managing Portfolios” on page 433.

## Process of Analyzing B, C, and D Accounts

To analyze B, C, and D accounts, perform the following tasks:

- 1 “Entering Details of the Account” on page 438
- 2 “Reviewing Opportunities” on page 441
- 3 “Reviewing Organizational Analysis” on page 441
- 4 “Reviewing Marketing Events” on page 442
- 5 “Reviewing Partners” on page 443
- 6 “Reviewing Objectives and Action Plans” on page 444

This process is a step in “Roadmap for Managing Portfolios” on page 433.

## Entering Details of the Account

You must enter details for each of your A, B, C, and D accounts.

This task is a step in “Process of Analyzing the A Accounts” on page 437 and “Process of Analyzing B, C, and D Accounts” on page 438.

### *To enter details of a portfolio account*

- 1 Navigate to the Accounts screen, then Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the appropriate account planning view.
- 4 Complete the necessary fields in the account planning view.

Some fields are described in the following table.

| Field                        | Comments                                                                                                                                                 |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account                      | Displays the name of the account.                                                                                                                        |
| Actual Account Type          | Select the type of account.                                                                                                                              |
| Importance To You Breakpoint | (A Account only) Displays the value that distinguishes the accounts on the top side of the segmentation map and the bottom side of the segmentation map. |

| Field                             | Comments                                                                                                                                                 |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Importance To Customer Breakpoint | (A Account only) Displays the value that distinguishes the accounts on the left side of the segmentation map and the right side of the segmentation map. |
| Account Team                      | Displays the team responsible for the account.                                                                                                           |

## Assessing Business Units and Service Units

To assess the business units and service units of an account, you must assign a value that indicates the value of the unit to you and to the customer. After you assess the units, you can view a BU/SU segmentation map. You can use the segmentation map to identify the units that you want to include in your analysis. To include a business or service unit on the map, select the Pursue field for the unit.

This task is a step in ["Process of Analyzing the A Accounts" on page 437](#).

### *To assess the business units and service units of an account*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the A Account Planning view, then the BU/SU Segmentation view.
- 4 Select Assessment from the drop-down list at the top of the BU/SU Segmentation view.  
The BU/SU Segmentation view displays the business and service units for the account.
- 5 Complete the necessary fields in the BU/SU Segmentation view.

Some fields are described in the following table.

| Field                  | Comments                                                                                                                                                                                                                                                                                             |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business/Service Unit  | Select a subaccount of the selected account. Alternatively, to create a new business unit or service unit, type the name of the unit.                                                                                                                                                                |
| Unit Type              | Select whether the unit is a business unit or a service unit.                                                                                                                                                                                                                                        |
| Importance To You      | Select the value that indicates the importance of the unit to you.                                                                                                                                                                                                                                   |
| Importance To Customer | Select the value that indicates the importance of the unit to the customer.                                                                                                                                                                                                                          |
| Pursue?                | Select this option if you want to include the business unit or service unit in your analysis. If you select this option, then the unit is included in the Selected Unit Analysis view. For more information about how to analyze units, see <a href="#">"Analyzing Selected Units" on page 440</a> . |

## Viewing the Segmentation Map of Business Units and Service Units

Complete the following procedure to view the segmentation map of business units and service units.

### *To view the segmentation map of business units and service units*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the A Account Planning view, then the BU/SU Segmentation view.
- 4 Select Map from the drop-down list at the top of the BU/SU Segmentation view.

The BU/SU Segmentation view displays the BU/SU segmentation map for the account. A diamond shape on the map represents a business unit. A square shape represents a service unit.

## Analyzing Selected Units

After you select the business units and service units that you want to work with, you must analyze these units, and add the business driver, initiative, and critical success factor information.

This task is a step in ["Process of Analyzing the A Accounts" on page 437](#).

### *To analyze selected business units and service units*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the A Account Planning view, then the Selected Unit Analysis view.  
You can review the fields in the Selected Unit Analysis view. For more information about the fields, see ["Assessing Business Units and Service Units" on page 439](#).
- 4 To add information about the business drivers for the BU/SU, create a new record in the Drivers list, and type the driver information in the Driver field.
- 5 To add information about the business initiatives for a driver, select the driver, create a new record in the Business Initiatives list, and complete the necessary fields.

Some fields are described in the following table.

| Field                   | Comments                                                                        |
|-------------------------|---------------------------------------------------------------------------------|
| Business Initiatives    | Type the business initiative associated with the business unit or service unit. |
| Critical Success Factor | Type the critical success factor associated with the business initiative.       |



## Reviewing Opportunities

You can review the opportunities associated with your accounts, and new opportunities if required.

This task is a step in [“Process of Analyzing the A Accounts” on page 437](#) and [“Process of Analyzing B, C, and D Accounts” on page 438](#).

### *To review opportunities for selected units*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the appropriate account planning view, then the Opportunities view.  
The current opportunities for the selected units appear.
- 4 To add an opportunity, create a new record, and complete the necessary fields.  
For information about the fields, see [“Opportunities \(End User\)” on page 365](#).

## Reviewing Organizational Analysis

You can review the contacts associated with an account or unit. You can add contacts, and you can create an organization chart to reflect the structure of contacts in an account or unit.

This task is a step in [“Process of Analyzing the A Accounts” on page 437](#) and [“Process of Analyzing B, C, and D Accounts” on page 438](#).

### *To review organizational analysis*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the appropriate account planning view, then the Organizational Analysis view.
- 4 Select Contacts from the drop-down list at the top of the Organizational Analysis view.  
The current contacts for the selected accounts or units appear.
- 5 Add a contact, and complete the necessary fields.  
Some fields are described in the following table.

| Field                  | Comments                                                                     |
|------------------------|------------------------------------------------------------------------------|
| Decision Orientation   | Select the orientation of the contact when the contact makes a decision.     |
| Adaptability to Change | Select the value that best describes how receptive the contact is to change. |

| Field                 | Comments                                                                                                  |
|-----------------------|-----------------------------------------------------------------------------------------------------------|
| Coverage              | Select the value that best describes how much communication you have had with the contact.                |
| Your Status           | Select the value that best describes your relationship with the contact.                                  |
| Level of Influence    | Select the value that best describes the level of influence that the contact has within the organization. |
| Business Agenda       | Type your understanding of the business agenda of the contact.                                            |
| Personal Agenda       | Type your understanding of the personal agenda of the contact.                                            |
| Relationship Strategy | Select the strategy to follow for the contact.                                                            |

- 6** To view or draw an organization chart of the business unit or service unit, select Organization Chart from the drop-down list at the top of the Organizational Analysis view.

For more information about how to create an organization analysis, see [“Creating an Organization Analysis” on page 378](#).

## Reviewing Marketing Events

You can review and update the marketing events associated with an account or unit. You can view the marketing events for a particular account or unit, or you can view marketing events for all units.

This task is a step in [“Process of Analyzing the A Accounts” on page 437](#) and [“Process of Analyzing B, C, and D Accounts” on page 438](#).

### *To review marketing events for selected accounts or units*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the appropriate account planning view, then the Marketing Events view.  
The current marketing events for the selected accounts or units appear.
- 4 To add a marketing event, create a new record, and complete the necessary fields.  
Some fields are described in the following table.

| Field        | Comments                                                                                                                                   |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Created Date | Displays the date on which you created the marketing event record. The date distinguishes the marketing event from other marketing events. |
| Event        | Select the type of event.                                                                                                                  |

| Field            | Comments                                     |
|------------------|----------------------------------------------|
| Target           | Type information about the target audience.  |
| Expected Results | Type information about the expected results. |

## Viewing Marketing Events for a Portfolio Plan

Complete the following procedure to view marketing events for a portfolio plan.

### *To view marketing events for a portfolio plan*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the All Marketing Events view.

All marketing events that are associated with accounts in the portfolio plan appear. For information about the fields in this screen, see [“Reviewing Partners” on page 443](#).

## Reviewing Partners

You can review and update the partners associated with an account or unit. You can view the partners for a particular account or unit, or you can view partners for all units.

This task is a step in [“Process of Analyzing the A Accounts” on page 437](#) and [“Process of Analyzing B, C, and D Accounts” on page 438](#).

### *To review partners for selected units*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the appropriate account planning view, then the Partners view.

The current partners for the selected units appear.

- 4 To add a partner, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field                     | Comments                                                                                          |
|---------------------------|---------------------------------------------------------------------------------------------------|
| Partner                   | Select a partner. Only accounts that have the Partner field selected are available for selection. |
| Partner Type              | Select the partner type.                                                                          |
| Relationship with Partner | Select the value that best describes your relationship with the partner.                          |

| Field                              | Comments                                                                                    |
|------------------------------------|---------------------------------------------------------------------------------------------|
| Partner Relationship with Account  | Select the value that best describes the relationship of the partner to the customer.       |
| Partner Alignment with Competitors | Select the value that best describes the relationship of the partner with your competitors. |
| Competitors                        | Select your competitors for the customer account.                                           |
| Relationship Owner                 | Displays the owner of the customer account.                                                 |

## Viewing Partners for a Portfolio Plan

Complete the following procedure to view partners for a portfolio plan.

### *To view partners for a portfolio plan*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the All Partners view.

All partners that are associated with accounts in the portfolio plan appear. For information about the fields in this screen, see [“Reviewing Partners” on page 443](#).

## Reviewing Objectives and Action Plans

You can review the *objective strategy and actions (OSA)* associated with an account. You can add objective strategy information and action plans to the account.

This task is a step in [“Process of Analyzing the A Accounts” on page 437](#) and [“Process of Analyzing B, C, and D Accounts” on page 438](#).

### *To review objective strategy and action plans*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the appropriate account planning view, and select the account on which you want to work.
- 4 Navigate to the OSA view.

The current objective strategy and action plans for the selected account appear.

- 5 To add objective strategy information, use the fields at the top of the OSA view. Some fields are described in the following table.

| Field            | Comments                                                                                                                                                                                                                                                                                  |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Unit or Resource | Type the unit or resource to which the objective applies. For example, the objective might be for business units, service units, opportunities, offerings, or groups of units. Alternatively, the objective might be for resources such as marketing, customer satisfaction, or partners. |
| Objective        | Type the objective of the action plan.                                                                                                                                                                                                                                                    |
| Strategy         | Type information about how to achieve the objective.                                                                                                                                                                                                                                      |

- 6 To add an action plan, create a new record, and complete the necessary fields. Some fields are described in the following table.

| Field              | Comments                                                             |
|--------------------|----------------------------------------------------------------------|
| Action             | Type details of the action.                                          |
| Planned Outcome    | Type details of the expected outcome of the action.                  |
| Due                | Select a date by which the action plan is due to be completed.       |
| Status             | Select the status of the action plan.                                |
| Owner              | Select the owner of the action plan from the list of employees.      |
| Activity Type      | Select the type of activity which is planned.                        |
| Start              | Select the date when the action plan starts.                         |
| Strategy Component | Select the strategy element of which the action plan is a part.      |
| Resources          | Type details of the resources required to implement the action plan. |

## Performing a Manager Review of a Portfolio Plan

When portfolio managers complete a portfolio plan, they can then request their manager to review and approve the plan.

**NOTE:** After you perform a manager review, you might want to update the Next Review Date field for the portfolio plan.

This task is a step in [“Roadmap for Managing Portfolios” on page 433](#).

### *To perform a manager review of a portfolio plan*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.

- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the Manager's Review view.
- 4 To add a review record, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                                                                                                            |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Review Date | Select a date on which the review occurs.                                                                                           |
| Reviewer    | Select the contact who performs the review.                                                                                         |
| Status      | Select the status for the portfolio plan. For example, to approve a portfolio plan, select Approved from the Status drop-down list. |

## Adding Solutions to Portfolio Plans

You can associate solutions with your portfolio plans, and specify whether or not to include the solution in the segmentation map.

This task is a step in ["Roadmap for Managing Portfolios" on page 433](#).

### *To add a solution to a portfolio plan*

- 1 Navigate to the Accounts screen, then the Portfolio Management Process view.
- 2 Drill down on the Portfolio Name field of the portfolio plan record.
- 3 Navigate to the Solutions view.
- 4 To add a solution, create a new record, and complete the necessary fields.

Some fields are described in the following table.

| Field          | Comments                                                             |
|----------------|----------------------------------------------------------------------|
| Solution       | Select the solution to associate with the portfolio plan.            |
| Show in Report | Select this option to include this solution in the segmentation map. |

# 40 System Preferences

This appendix lists some system preferences in your Siebel Business Applications. It includes the following topic: [“System Preferences for Siebel Business Applications” on page 447](#).

## System Preferences for Siebel Business Applications

[Table 86](#) includes some system preferences for Siebel Business Applications. For information about how to change system preferences, see [“Setting System Preferences” on page 40](#).

Table 86. System Preferences

| Preference                     | Description                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ActivationLoadBalancerConfig   | Set this preference to the Configuration ID for the load splitter configuration that you want to use for activating territory alignments. For use with the Assignment Manager's load splitter. For more information about load splitter, see <i>Siebel Assignment Manager Administration Guide</i> . For more information about activating territory alignments, see <i>Siebel Territory Management Guide</i> . |
| Activity Hierarchy: Max Levels | Specifies the maximum number of levels for the Activity Hierarchy.                                                                                                                                                                                                                                                                                                                                              |
| Alarm Manager Load Frequency   | Specifies the number of minutes the Siebel application waits before rechecking for alarms.<br><br>The default value is 60.                                                                                                                                                                                                                                                                                      |
| AllowOverReceipts              | If this preference is set to TRUE, then the received quantity can be greater than the shipped quantity. Also, for an internal order, when the Process Receipt command is invoked, the pick ticket can be closed only when the received quantity is equal to or greater than the shipped quantity. For more information about shipping and receiving, see <i>Siebel Field Service Guide</i> .                    |
| Always Show Message Bar Alerts | Obsolete.                                                                                                                                                                                                                                                                                                                                                                                                       |
| Asgn:Inherit Org Candidates    | If this preference is set to TRUE, then the organization candidates on an assignment rule can be copied to rules that inherit from the assignment rule. After the rule is inherited, any change to the organization candidate of the original rule has no effect on the inherited rule.                                                                                                                         |

Table 86. System Preferences

| Preference                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Auto Mgr Calendar Access       | <p>Permits the employee's manager access to the employee's calendar, even if the employee does not explicitly give the manager access.</p> <p>The default value is True.</p>                                                                                                                                                                                                                                                                                                                                                       |
| Calendar Team Primary          | <p>Determines the employee calendars that an employee manager can access. This preference applies only if you set the Auto Mgr Calendar Access preference to True.</p> <p>A value of True indicates the manager can access the calendars of only the employees who are primary employees in the position hierarchy of the manager.</p> <p>A value of False indicates the manager can access the calendars of all employees in the position hierarchy of the manager.</p>                                                           |
| CSM Logging                    | <p>Enables logging of merge transactions. Merge transactions are created when connected users combine or merge two or more business components, such as accounts or opportunities, into one business component.</p> <p>Information from this log can be used to relink orphaned records created when the merge process is crossed with an update process during a synchronization.</p> <p>This preference is applicable only if the installation uses Siebel Remote or Replication Manager.</p> <p>The default value is False.</p> |
| DB2: Default Opt Level         | Specifies the default optimization level which defines the optimizing algorithm that DB2 uses to execute SQL statements.                                                                                                                                                                                                                                                                                                                                                                                                           |
| DBX: Vis Rules per Statement 1 | Specifies the number of visibility or routing rules checked for each SQL statement processed by the Database Extract component for the first SQL statement with header information.                                                                                                                                                                                                                                                                                                                                                |
| DBX: Vis Rules per Statement N | Specifies the number of visibility or routing rules checked for each SQL statement processed by the Database Extract component for other SQL statements.                                                                                                                                                                                                                                                                                                                                                                           |
| Default Campaign Source Code   | Specifies the default campaign for Web offers used in Siebel Marketing. All offers that are a part of the default campaign appear in the Featured Offers applet in Siebel Marketing.                                                                                                                                                                                                                                                                                                                                               |
| Default EC Procedure           | Obsolete.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Default Offer Code             | Specifies the code to track the click path of a customer on the Marketing Web site who does not select a specific offer.                                                                                                                                                                                                                                                                                                                                                                                                           |
| Default Pricing Procedure      | Obsolete.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |



Table 86. System Preferences

| Preference                                                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Default Time Zone                                         | <p>Specifies the default time zone for all users of the Siebel database.</p> <p>When a user logs in, the Time Zone field of the User business component is checked. If the field is empty, then the Default Time Zone system preference is checked.</p> <p>The default value is UTC.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Entitlement: Pricing Dates                                | <p>If this preference is set to False or NULL, then date verification is skipped when entitlement pricing terms are checked in the Verify Entitlement process. (This preference is similar to the Entitlement: Verify Dates system preference except that this preference applies to entitlement pricing terms and the other preference applies to entitlement service terms.)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Enable UPT                                                | <p>For more information, see <a href="#">Chapter 7, "Usage Pattern Tracking."</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Enable ST Script Engine                                   | <p>Set this preference to TRUE to enable the Strong Typing (ST) eScript engine. Siebel eScript is a scripting language that application developers use to write simple scripts to extend Siebel Business Applications. The Strong Typing eScript engine provides improved performance, scalability, and enhanced functionality when running scripts. For more information about the ST eScript engine, see <i>Using Siebel Tools</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                |
| EnableAuditing                                            | <p>For more information, see <a href="#">Chapter 6, "Siebel Audit Trail."</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| EnableEimAuditing                                         | <p>For more information, see <a href="#">Chapter 6, "Siebel Audit Trail."</a></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Entitlement: Verify Consumer                              | <p>For more information, see <i>Siebel Field Service Guide</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Entitlement: Verify Dates                                 | <p>For more information, see <i>Siebel Field Service Guide</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Entitlement: Verify Product                               | <p>For more information, see <i>Siebel Field Service Guide</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| ETL Analysis End<br>ETL Analysis Start<br>ETL Date Format | <p>ETL Date format specifies the way dates are interpreted. The other two preferences specify the date range for which the Exchange Rates are adjusted. This range does not indicate that only the data created within this range is extracted. Select the earliest date for the Analysis Start Date (when the transactions might have begun). In addition to considering the created and modified dates, consider other relevant dates such as order date. Setting this date to an early value such as 19700101 (January 1, 1970) does not affect the processing time. A similar logic applies for choosing Analysis End Date. Enter the values in the format defined by ETL Date Format.</p> <p>The default Analysis End value is 20101231.</p> <p>The default Analysis Start value is 19940101.</p> <p>The default Date Format value is YYYYMMDD.</p> |

Table 86. System Preferences

| Preference                                     | Description                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ETL Base Exchange Currency                     | <p>Specifies the currency in which all the financial data is converted. While the OLTP supports transactions in many different currencies, the data in the OLAP is converted to a single currency for analysis purposes. The Exchange rates are derived from the Exchange Rates table in the OLTP.</p> <p>The default value is USD.</p>                                                         |
| ETL Default Continent                          | <p>Specifies the value for any address that does not have Continent defined. Set this preference to a value, which is used if the value of Continent is not defined in the OLTP.</p> <p>The default value is North America.</p>                                                                                                                                                                 |
| ETL Default Country                            | <p>Specifies the value for any address that does not have the Country defined. Set this preference to a value, which is used if the value of Country is not defined in the OLTP.</p> <p>The default value is USA.</p>                                                                                                                                                                           |
| ETL Default Currency                           | <p>Specifies the value for currency code that is used if the currency code for a specific financial transaction is not set.</p> <p>The default value is USA.</p>                                                                                                                                                                                                                                |
| ETL Default Language                           | <p>Specifies the language code used when language translation occurs when looking up the List of Values table.</p> <p>The default value is ENU.</p>                                                                                                                                                                                                                                             |
| ETL LOV Maximum Value<br>ETL LOV Minimum Value | <p>Set these preferences to the maximum and minimum values for bucketing of fields. Instead of indicating the number of employees at an account is 45, 96, the values can be bucketed to 0-50, 50-100 and so on. In the List of Values, if the minimum and maximum values are not specified, then the values of these preferences are used.</p> <p>The default values are 9999999999 and 0.</p> |
| ETL Unknown Exchange Rate                      | <p>Specifies the value used when an exchange rate for a currency to the Datamart Default Currency is undefined in the OLTP.</p> <p>The default value is 1.</p>                                                                                                                                                                                                                                  |
| Forecast: Auto-Forecast                        | Creates subordinates' forecasts to be used in a rollup forecast, if the subordinates have not created forecasts themselves.                                                                                                                                                                                                                                                                     |
| Forecast: Use Server Task                      | Sends forecast processing requests to the Siebel Server for batch processing. If the value is False, then requests are processed locally.                                                                                                                                                                                                                                                       |

Table 86. System Preferences

| Preference                     | Description                                                                                                                                                                                                                                                                                                      |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FSAssetSwap SubComponents      | If this preference is set to TRUE, then the subcomponent assets of the source asset are shifted to the target asset when an activity part tracker transaction is committed.                                                                                                                                      |
| FSDB:Override Service Region   | Specifies the maximum monetary value accepted in Auction Item, Bid, and Fee currency fields.                                                                                                                                                                                                                     |
| Internal DUNS Number           | Specifies your company's DUNS number.                                                                                                                                                                                                                                                                            |
| LOGMGR:Vis Rules per Statement | Set this preference to 20 for implementation that use any database other than Oracle.<br><br>The default value is 50.                                                                                                                                                                                            |
| MRG:Docking Timestamp Source   | For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .                                                                                                                                                                                                                    |
| MRG:Inter Table Conflict Res   | For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .                                                                                                                                                                                                                    |
| MRG:Inter Table Merge Rule     | For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .                                                                                                                                                                                                                    |
| MRG:System Conflict Resolution | For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .                                                                                                                                                                                                                    |
| MRG:Txns per Commit            | For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .                                                                                                                                                                                                                    |
| MRG:User Friendly Notification | For more information, see <i>Siebel Remote and Replication Manager Administration Guide</i> .                                                                                                                                                                                                                    |
| PSP Pricing Var Map - Context  | For more information, see <i>Siebel Pricing Administration Guide</i> .                                                                                                                                                                                                                                           |
| PSP Pricing Var Map - Row Set  | For more information, see <i>Siebel Pricing Administration Guide</i> .                                                                                                                                                                                                                                           |
| PSP Pricing Var Map - XA       | For more information, see <i>Siebel Pricing Administration Guide</i> .                                                                                                                                                                                                                                           |
| ProposalReportSleepTime        | Set this preference to lengthen the time to write the records so that all of the records are included in the report. If a report in a section of a proposal contains a large number of records, then the document server can stop the srviewer before all of the records are written to the resulting HTML file. |
| Quick Print Application        | Determines which application is used by quick print. Allowed values are HTML and EXCEL. This preference can be overridden by the Quick Print Application user preference.                                                                                                                                        |
| Quick Print Output Format      | Set this preference to HTML, CSV, or Tab, as appropriate for the quick print application that you are using.                                                                                                                                                                                                     |

Table 86. System Preferences

| Preference                      | Description                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RunAlignmentLoadBalancer Config | Set this preference to the Configuration ID for the load splitter configuration that you want to use for running territory alignments. For use with the Assignment Manager's load splitter. For more information about load splitter, see <i>Siebel Assignment Manager Administration Guide</i> . For more information about running territory alignments, see <i>Siebel Territory Management Guide</i> . |
| SalesHierarchy:UseServerTask    | If this preference is set to TRUE, then the Sales Hierarchy operation runs as a server task.                                                                                                                                                                                                                                                                                                              |
| Satmetrix Key Value             | Specifies a string provided by Satmetrix to customers of Siebel Satmetrix Surveys. Required for generating encrypted tokens that are part of URLs for displaying survey reports.                                                                                                                                                                                                                          |
| Sch:Break Time Id               | <p>Specifies the Row ID of the work type to be used when calculating the schedule cost where activities contain breaks. The default value is -1.</p> <p>To find the Row ID, navigate to the Administration - Data screen, then the Work Type view, select the record, select Help from the application-level menu, select About Record, and note the value for the row number.</p>                        |
| Sch:Default Constraint Set      | <p>Specifies the Row ID of the constraint set to be used where no constraint set is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen, then the Constraint Sets view, select the record, select Help from the application-level menu, select About Record, and note the value for the row number.</p>       |
| Sch:Default Cost Function       | <p>Specifies the Row ID of the cost function to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen, then the Cost Functions view, select the record, select Help from the application-level menu, select About Record, and note the value for the row number.</p>          |
| Sch:Default Parameter Set       | <p>Specifies the Row ID of the parameter set to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen, then the Parameter Sets view, select the record, select Help from the application-level menu, select About Record, and note the value for the row number.</p>          |

Table 86. System Preferences

| Preference                 | Description                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sch:Default Time Window    | <p>Specifies the Row ID of the time window to be used where no cost function is associated with the service region loaded. The default value is -1.</p> <p>To find the Row ID, navigate to the Scheduling Administration screen, then the Time Window view, select the record, select Help from the application-level menu, select About Record, and note the value for the row number.</p> |
| SecThickClientExtAuthent   | For more information, see <i>Siebel Security Guide</i> .                                                                                                                                                                                                                                                                                                                                    |
| SM WebIntelligence Server  | Specifies the URL that points to the Web Intelligence server that serves up reports for Oracle Business Intelligence.                                                                                                                                                                                                                                                                       |
| SqlStyle                   | Specifies the SQL statements to use with this implementation (Oracle, Microsoft SQL Server, Informix, or Sybase). Case-sensitive.                                                                                                                                                                                                                                                           |
| SSASqlErrRsItsDiscarded    | Specifies the message that appears to the user when there are more rows than can be returned. For more information, see <i>Implementing Siebel Business Applications on DB2 for z/OS</i> .                                                                                                                                                                                                  |
| Strict Date Format         | Set this preference to the date format that you require to implement a strict date format. For example, to implement DD/MMM/YYYY date format, enter DD/MMM/YYYY. When you implement a strict date format, users can enter dates only in a format you specify, and all dates appear in this format.                                                                                          |
| SubSqlStyle                | Specifies an SQLStyle that falls within a family of similar database products.                                                                                                                                                                                                                                                                                                              |
| Technical Support (Alt. 1) | <p>Specifies the telephone numbers to appear in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses.</p> <p>Set the value to None to leave it blank in the dialog box.</p>                                                               |
| Technical Support (Alt. 2) | <p>Specifies the telephone numbers to appear in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses.</p> <p>Set the value to None to leave it blank in the dialog box.</p>                                                               |
| Technical Support (FAX)    | <p>Specifies the fax number to appear in the Siebel Technical Support dialog box. Update this number to match your internal help desk fax number.</p> <p>Set the value to None to leave it blank in the dialog box.</p>                                                                                                                                                                     |

Table 86. System Preferences

| Preference                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Technical Support (URL)    | <p>Specifies the support URL to appear in the Siebel Technical Support dialog box. Update this URL to match your internal help desk Web address.</p> <p>Set the value to None to leave it blank in the dialog box.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Technical Support (Voice)  | <p>Specifies the voice number to appear in the Siebel Technical Support dialog box. Update this number to match your internal help desk number.</p> <p>Set the value to None to leave it blank in the dialog box.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Time Slice Report Format   | For more information, see <i>Siebel Product Administration Guide</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Universal Time Coordinated | <p>Enables global time zone support for the entire Siebel application. Set this preference to TRUE to enable global time zone support. The default setting is TRUE.</p> <p><b>NOTE:</b> This setting is a one-time setting. After you enable global time zone support in a production environment, do not disable it.</p> <p>If you intend to operate your deployment with the Global Time Zone feature enabled, then you must also set the operating system of your database servers to UTC time, or its equivalent.</p> <p>Although enabling this feature is optional, it is strongly recommended that you operate your production environment with Global Time Zone enabled. For more information about enabling Global Time Zone, see <i>Siebel Global Deployment Guide</i>.</p> |
| UPT Max Record Count       | For more information, see <a href="#">Chapter 7, “Usage Pattern Tracking.”</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| User Group                 | Specifies the User Group grantee for database access privileges. This preference is used in the DDL Sync step in Oracle’s Siebel Tools where the schema for the Siebel application is defined.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

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