Siebel CRM

Fundamentals Guide

Siebel Innovation Pack 2016, Rev. A

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Preface

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

Audience

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

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
italic	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter.

1

What's New in This Release

This chapter describes new product features.

What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2016, Rev. A

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

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

Table 1–1   What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2016, Rev. A

Topic	Description
Chapter 13, "Using Notifications"	New chapter. This includes information about how to use, administer, and review notification messages for Siebel Business Applications.

What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2016

Table 1–2 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 1–2   What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2016

Topic	Description
"About the Fourth Level Subview Bar" on page 3-6	New topic. It includes information about the fourth level subview bar.
"About the Menu Toolbar" on page 3-4	Modified topic. It includes information about the Send icon.
"About Sending Messages" on page 3-12	New topic. It includes information about sending messages by using the menu toolbar.

Table 1–2   (Cont.) What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2016

Topic	Description
"About Siebel User Interface Behavior" on page 3-16	New topic. It lists some issues to note about the Siebel user interface behavior.
"About Using the Participant Availability Subview" on page 12-6	Modified topic. It includes more information about the functionality in the Participant Availability Subview.
"About Using Alarms for Activities" on page 12-8	New topic. It includes information about using alarms for activities.
"Creating Recurring Calendar Activities" on page 12-10	Modified topic. It includes information about new field names. for recurring calendar activities.
"Activating Alarms" on page 12-18	New topic. It includes information about how to activate alarms for calendars.
"Postponing and Dismissing Alarms" on page 12-19	New topic. It includes information about how to postpone and dismiss alarms for calendars.
"Setting Navigation Options" on page 14-3	Modified topic. It includes more information about the navigation options in Siebel applications.
"Activating Alarms for All Calendar Activities" on page 14-13	New topic. It includes information about how to activate alarms for all calendar activities.
"Setting Up Default Alarm Lead Times" on page 14-13	New topic. It includes information about how to set up default alarm lead times in calendars
"Setting Up Default Alarm Snooze Times" on page 14-14	New topic. It includes information about how to set up default alarm snooze times in calendars.
"Setting a User Profile Image" on page 14-17	New topic. It shows you how to set a user profile image for the Siebel application, which involves uploading a user profile image to Siebel Server.
"Communication Management Keyboard Shortcuts" on page 15-6	New topic. It lists the keyboard shortcuts you can use to share information with others in Siebel CRM.
"Call Management Keyboard Shortcuts" on page 15-6	New topic. It lists the keyboard shortcuts you can use when calling others in Siebel CRM.
"About Screen Readers" on page A-3	Modified topic. It includes more information about the user interface areas for level bar regions.

What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2015

Table 1–3 lists the changes in this revision of the documentation to support this release of the software.

> **Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

Table 1–3   What's New in Siebel CRM Fundamentals Guide, Siebel Innovation Pack 2015

Topic	Description
"Using Browser Features" on page 2-3	Modified topic. It includes updated information about using browser features.

Table 1–3   (Cont.) What's New in Siebel CRM Fundamentals Guide, Siebel Innovation

Topic	Description
"About the Simplified User Interface" on page 3-17	New topic. It includes information about the Simplified User Interface.
"Using and Saving Charts" on page 3-13	Modified topic. It includes information about charts in Siebel Innovation Pack 2015 and later.
"Navigating Between Records in Lists" on page 3-7	Modified topic. It includes updated information navigating between records in a list.
"About Common Icons in Lists and Forms" on page 3-10	Modified topic. It includes updated information about common buttons in lists and forms.
"About Field Control Buttons" on page 4-4	Modified topic. It includes updated information about field control buttons.
"About Common Buttons in Queries" on page 7-2	New topic. It includes information about common buttons available when performing a query.
"About the Calendar" on page 12-2	Modified topic. It includes updated information about printing calendars.
"Setting Themes" on page 14-4	New topic. It includes information about setting themes.

2

Getting Started with the Siebel Application

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

- Logging In to the Siebel Application
- About Access and Responsibilities in the Siebel Application
- Using Browser Features
- Logging Out of the Siebel Application
- Locale Support

Logging In to the Siebel Application

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

To log in to the Siebel application

1. Use your browser to navigate to the URL provided by your organization.

    A login screen appears.

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

2. Enter your user ID and password.

    Contact your Siebel administrator if you are not sure of your user ID or password.

3. (Optional) To save your user ID, select the Remember my User ID check box.

    For more information about the Remember my User ID option, see *Siebel Security Guide*.

4. (Optional) Click the HTML5 Browser Compatibility link on the login screen to show your browser's compatibility with HTML5 features.

HTML5 is a core technology markup language of the Internet which is used to structure and present content on the Web. If an HTML5 feature is not compatible with your browser, then you can click the question mark icon to review more information about that feature and about the limitations that you might experience in the Siebel CRM application because of this incompatibility.

5. Click Login.

6. If the Siebel Browser Check dialog box appears, then follow the on-screen instructions.

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

About the Demo Application

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

About the Home Page

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

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

About Access and Responsibilities in the Siebel Application

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

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

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

Caution: Do not delete or merge positions because doing so renders the primary position invalid.

The following factors can determine the records you see:

- A record can be assigned an owner, meaning that it can be assigned to only one person. Only the owner of the record can see it. This type of record is called a *personally owned record* because only one user can own the record.

- A record can be assigned to a team. Only the people who are team members in the team for the record can see the record.

- Companies can distribute records by organization. For example, users in the South American region of an organization see only records for South America. Companies with channel partners can also use organizations to partition data, allowing their partners to access only the data that they need.

Using Browser Features

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

> **Note:** Data record changes are not committed when you click the browser back button. An implicit commit of data record changes when a user clicks the browser back button cannot be supported in a standards-based implementation. Users must commit changes through supported method. When transaction data changes are pending for an applet, a red box frames the title of the applet indicating that the transaction is not complete. When the transaction is complete, the red frame is removed from the applet title.

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

To refresh data in your Siebel application, it is recommended that you use Siebel query functionality. For more information about querying, see Chapter 7, "Using Query to Locate Information."

The Siebel application also rebuilds the memory cache (view layouts). These view layouts are your most frequently used views. For more information about view layouts and the memory cache, see *Siebel Performance Tuning Guide* on Oracle Technology Network (http://www.oracle.com/technetwork/indexes/documentation/index.html).

Logging Out of the Siebel Application

After you use the Siebel application, you exit it.

> **Note:** Do not close the browser window by clicking the Close (X) icon in the upper right corner of the page to exit the Siebel application. Automatic logout upon closing the browser is not supported. Always log out of the application explicitly by using the Log Out button.

To log out of the Siebel application

■ Complete either of the following steps:

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

– Click the Settings icon on the menu toolbar on the application banner, and then click Log Out.

Locale Support

Siebel supports numerous languages, up to double byte character support. Surrogate pairs are not supported. For more information about Certifications, see article 1492194.1 (Doc ID) on My Oracle Support.

3

About the User Interface

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

- Elements of the Siebel Application Window
- About the Application Banner
- About the Side Menu
- About the Branding Area
- About the Application-Level Menu
- About the Menu Toolbar
- About the Application Toolbar
- About the Second Level View Bar
- About the Visibility Filter
- About Lists
- About Forms
- About Screens
- Home Pages for Screens
- About Common Icons in Lists and Forms
- Using the Site Map
- About the Saved Queries Drop-Down List
- About the Query Control
- About Sending Messages
- Accessing the Communications Panel
- Using and Saving Charts
- About the Action Pane
- About Explorer Views
- About Keyboard Navigation
- About Siebel User Interface Behavior
- About the Simplified User Interface

Elements of the Siebel Application Window

The Siebel application window by default uses the default Siebel Open UI theme. Figure 3–1 shows the main elements of an example Siebel application window using the default Siebel Open UI theme. Typically, the main elements of the Siebel application window, from top to bottom and left to right are:

1. **Application banner,** which contains the following elements from left to right: side menu, branding area, application-level menu, and menu toolbar. For more information, see "About the Application Banner" on page 3-3.

2. **Application toolbar,** which contains the following buttons: query, execute query, apply target list, save target list, site map, how do I, tasks. For more information, see "About the Application Toolbar" on page 3-4.

3. **Second level view bar,** which appears immediately below the application toolbar on the left side of the screen. For more information, see "About the Second Level View Bar" on page 3-5.

4. **Visibility filter,** which appears at the top of a screen or view in the Siebel application (provided a visibility filter is available for the screen or view). For more information, see "About the Visibility Filter" on page 3-6.

5. **List,** which consists of multiple records presented as rows. For more information, see "About Lists" on page 3-6.

6. **Form**, which typically appears below a list and contains the data for the record you select in the list. For more information, see "About Forms" on page 3-8.

7. **Common icons in lists and forms**, which appear at the top of lists and forms. For more information, see "About Common Icons in Lists and Forms" on page 3-10.

These features are described in more detail in the remainder of this chapter.

Figure 3–1   Main Elements of Siebel Application Window
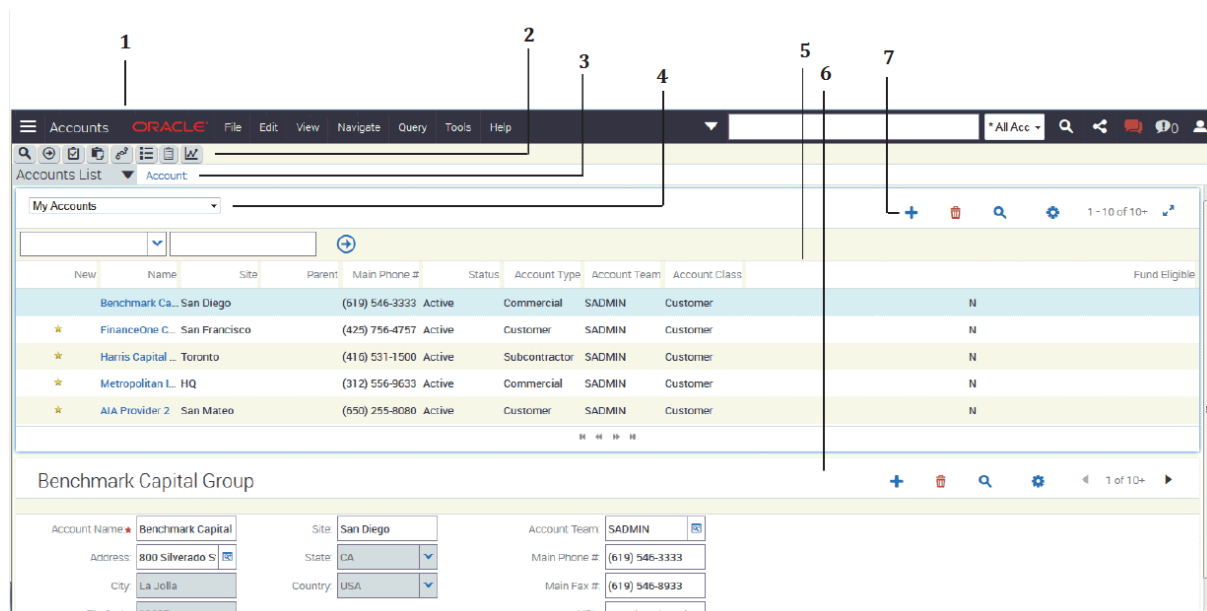
About the Application Banner

The application banner (shown in Figure 3–2) is located at the top of the application window and it persists for all views. The following elements are available on the application banner:

1. **Side menu.** For more information, see "About the Side Menu" on page 3-3.

2. **Branding area.** For more information, see "About the Branding Area" on page 3-3.

3. **Application-level menu.** For more information, see "About the Application-Level Menu" on page 3-3.

4. **Menu toolbar.** For more information, see "About the Menu Toolbar" on page 3-4.

Figure 3–2   Siebel Application Banner

About the Side Menu

The Side Menu icon (shown in Figure 3–2) is located on the application banner at the top left side of the application window. It is characterized by three horizontal lines stacked on top of one another. Click the Side Menu icon to view a list of available screen names.

About the Branding Area

In the preconfigured application, the branding area (shown in Figure 3–2) is located on the application banner at the top left side of the application window and shows the Oracle logo. In your application, the branding area might not be in this location and might show your company logo.

About the Application-Level Menu

The application-level menu (shown in Figure 3–2) is located on the application banner at the top left side of the application window, and includes the following options:

- File
- Edit
- View
- Navigate
- Query
- Tools
- Help

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

About the Menu Toolbar

The menu toolbar (shown in Figure 3–2) is located on the application banner at the top right side of the application window. The following list describes the areas of the menu toolbar (shown in Figure 3–3), from left to right:

1. **The Saved Queries drop-down list.** Click the down arrow in the drop-down list to access contextual saved queries. For more information, see "About the Saved Queries Drop-Down List" on page 3-11.

2. **The Magnifying Glass (Search) icon.** Click this icon to open the query control. For more information, see "About the Query Control" on page 3-11.

3. **Share (or Send) icon.** Click this icon to send email messages, faxes, pages, and outbound wireless messages. For more information, see "About Sending Messages" on page 3-12.

4. **The Communications icon.** Click this icon to open the communications panel. For more information, see "Accessing the Communications Panel" on page 3-12.

5. **The Notification icon.** Click this icon to open the Notification Summary pane. For more information, see Chapter 13, "Using Notifications.".

6. **The Settings icon.** Click this icon to change your application behavior settings, such as the startup view, navigation control, UI theme, and view transition, or to logout. For more information about configuring the application behavior settings, see Chapter 14, "Setting User Preferences."

Figure 3–3   Siebel Application Menu Toolbar
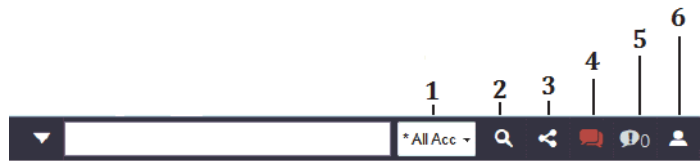
About the Application Toolbar

The application toolbar (Figure 3–1) appears below the application-level menu (shown in Figure 3–2). Table 3–1 describes the tools available on the application toolbar.

Table 3–1   Application Toolbar Controls

Control	Name	Description	Related Information
🔍	New Query button	Starts a new query.	Chapter 7, "Using Query to Locate Information"
⊕	Execute Query button	Executes a query.	Chapter 7, "Using Query to Locate Information"
📋	Apply Target List button	Applies a target list to a view.	*Siebel Applications Administration Guide*.
📋	Save Target List button	Creates a target list.	*Siebel Applications Administration Guide*.

Table 3–1   (Cont.) Application Toolbar Controls

Control	Name	Description	Related Information
	Site Map button	Displays the Site Map.	"Using the Site Map" on page 3-10
	How Do I button	Accesses iHelp, which provides guidance for tasks.	Chapter 8, "Using iHelp"
	Tasks button	Activates a Task UI wizard to guide you through a series of steps to complete a specific task.	Chapter 9, "Using Task UI"
	Reports button	Accesses reports for the screen you are working in.	"Running Reports" on page 11-2

About the Second Level View Bar

After selecting a screen, you must determine the record set that you want to view in the screen. The record set names (or view names) appear in the second level view bar. The second level view bar appears immediately below the application toolbar on the left side of the screen. It looks similar to the view bars for other levels.Views can contain lists, forms, charts, explorer formats, subviews, and so on.

An example of a second level view bar is shown in Figure 3–1. You access a second level view by clicking the drop-down arrow in the second level view bar and then clicking the view name.

The name of the active view appears in a different color than the color for the other view names in the list. If the name for the view you want to use is not visible, then use the scroll down arrow on the right side of the list to display that view name.

You can configure your Siebel application to show the names for the second level view bar in a link bar under screen tabs at the top of the screen or in tree format on the left side of the screen. For more information, see "Setting Navigation Options" on page 14-3.

Related Topics

- "About Lists" on page 3-6

- "About Forms" on page 3-8

- "Using and Saving Charts" on page 3-13

- "About Explorer Views" on page 3-14

About the Third Level View Bar

After selecting a view, you can drill down on a field in a record of the view to display more view names in the third level view bar lower on the screen. The third level view bar looks similar to the view bars for other levels.Views can contain lists, forms, charts, explorer formats, subviews, and so on.

You access a third level view by clicking the drop-down arrow in the third level view bar and then clicking the view name. The view displays more data for the record that you drill down on. For example, if you drill down on a contact record in the Contacts List of the Contacts screen, then when you click the Activities view name in the third level view bar, activities that are associated with that contact record appear.

The name of the active view appears in a different color than the color for the other view names in the list. If the name for the view you want to use is not visible, then use the scroll down arrow on the right side of the list to display that view name.

You can configure your Siebel application to show the names for the third level view bar in tab format lower on the screen. For more information, see "Setting Navigation Options" on page 14-3.

You can specify the third level views that appear in the Siebel application. For more information, see "Showing, Hiding, and Reordering Screens or Views" on page 14-10.

Related Topics

- "About Lists" on page 3-6
- "About Forms" on page 3-8

About the Fourth Level Subview Bar

After you access a view in the third level view bar, a fourth level subview bar can display subview names associated with the third level view. The fourth level subview bar appears next to the third level view bar. Many third level views do not have a fourth level subview. The fourth level subview bar looks similar to the view bars for other levels.

You access a fourth level subview by clicking the drop-down arrow in the fourth level subview bar and then clicking the subview name. The subview displays more data for the third level view.

The name of the active subview appears in a different color than the color for the other subview names in the list.

You can configure your Siebel application to show the names for the fourth level subview bar in a link bar under the view tabs lower on the screen or when you hover the curser over a view tab lower on the screen. For more information, see "Setting Navigation Options" on page 14-3.

About the Visibility Filter

An example of a visibility filter is shown in Figure 3–1. For more information about using visibility filters, "Using the Visibility Filter in Lists" on page 3-7.

About Lists

A list consists of multiple records, presented as rows. An example of a list is shown in Figure 3–1. For information about determining the number of records in a list, see "Displaying Record Count" on page 6-9.

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

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

This topic contains the following information:

- "Using the Visibility Filter in Lists" on page 3-7
- "Navigating Between Records in Lists" on page 3-7

- "Horizontal Scrolling in Lists" on page 3-8
- "Expanding and Collapsing Lists" on page 3-8

Using the Visibility Filter in Lists

The visibility filter, which appears in list headers, lets you access a set of records by filter values, such as My Accounts, My Team's Accounts, and so on. An example of a visibility filter bar is shown in Figure 3–1.

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

Table 3–2 describes each filter value in the visibility filter. In this table, the Accounts screen is used as an example, but these filters can appear in any screen. Because of your responsibilities, you might not see some filters in this table.

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

Table 3–2   Visibility Filter Values

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

Navigating Between Records in Lists

Use the navigation buttons that appear at the bottom of a list to navigate between the records in the list. Table 3–3 describes the navigation buttons.

Table 3–3   Description of Navigation Buttons for Lists

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

Table 3–3   (Cont.) Description of Navigation Buttons for Lists

Button	Description
⧏	Navigates to the next record set.

> **Note:**   There is no Go to First record or Go to Last record navigation button. It is recommended that you use Search to reduce data sets.

The record number range for a list appears in the top right corner of the list, and shows the number range for the records that appear in the list. The record number range changes as you navigate between the records in the list. An estimate of the total number of list records appears to the right of the record number range. You must navigate to the end of the list to see the exact total number of list records to the right of the record number range.

Horizontal Scrolling in Lists

Use the horizontal scroll bar to navigate through all of the columns in a list. The horizontal scroll bar appears above the vertical navigation buttons in lists that contain more columns than can fit on the screen. For information about designating the columns that appear on the screen, see "Organizing List Columns" on page 6-15.

Expanding and Collapsing Lists

Every list has a show more button or a show less button in the top right corner. Clicking the show more or show less button allows you to see more or fewer records in a list. Table 3–4 describes the show more and show less buttons.

Table 3–4   Description of Show More and Show Less Buttons

Button	Description
⤢	Displays more records to expand a collapsed list.
⤡	Displays fewer records to collapse an expanded list.

About Forms

A form that appears below a list contains the data for the record you select in the list. Also, when you drill down on a field in a record in a list, you see a form at the top of the screen that contains data for the record you drill down on. A form contains the data for one record. An example of a form is shown in Figure 3–1.

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

In some cases, you can click the show more button to access a long form, and then click the show less button to access the short form. These buttons appear in the top

right corner of the form. For examples of the show more and show less buttons, see "Expanding and Collapsing Lists" on page 3-8.

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

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

About Screens

Information in the Siebel application is organized into screens. You access a screen by clicking the Side Menu icon (shown in Figure 3–1) on the application banner, and then clicking the appropriate screen name, such as Opportunities, Calendar, or Accounts, from the list that appears. The name of the active screen appears in a different color than the color for the other screen names in the list.

You can also use the Site Map to navigate to a screen. If you select from the Site Map a screen name that does not appear in the screen list for the Side Menu, then the screen name appears in the screen list when you navigate to that screen. This screen is visible only for the current session. For more information, see "Using the Site Map" on page 3-10.

You can configure your Siebel application to show the names for screens in tab format across the top of the screen or in a tree format on the left side of the screen. For more information, see "Setting Navigation Options" on page 14-3.

You can specify the screens that appear in the Siebel application. For more information, see "Showing, Hiding, and Reordering Screens or Views" on page 14-10.

Icons appear next to screen names. A Siebel administrator can change these icons in Siebel Tools. If you do not want to display these icons, then contact your Siebel administrator.

Home Pages for Screens

A screen home page is a gateway to the common functions for that screen. Table 3–5 describes the main elements in screen home pages.

Table 3–5   Main Elements for Screen Home Pages

Element	Description
Frequently Viewed *Screen name*	An area that contains a list of links to the lists of data with which you most frequently work. This list can be a combination of predefined queries and visibility filters. For more information, see "Setting Up View Links for Screen Home Pages" on page 14-9.
Recent Records	Recent items area that contains a list of the last five records that you accessed (by drilling down on the record), created, or modified. This area allows you to return to a recent record with a single click. Recent records are stored in your user preferences.
iHelp	Task area that contains a list of links to the most important tasks for the screen. When you drill down on a task, iHelp is launched to guide you through the completion of the task.

Table 3–5   (Cont.) Main Elements for Screen Home Pages

Element	Description
Search	Query area where you can enter query criteria directly into the fields, and click Go to navigate directly to the list with your query results.
Add	Add area that you use to add new records. You complete the fields, and click Add & Go to add the record to the database and navigate directly to the form containing the new record you add.

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

About Common Icons in Lists and Forms

Icons appear at the top of lists and forms. Table 3–6 describes these icons. Your Siebel application might contain additional icons or other elements on each list and form.

Table 3–6   Common Icons in Lists and Forms

Button	Description
	The Cogwheel icon accesses a menu of options that apply to the active form, list, explorer view, or selected record in a list. Using the options in the Cogwheel icon, you can perform actions such as copying, deleting, and advanced sorting.
	The plus (+) icon creates a new record. In a list, clicking this icon inserts a new row at the top of the list so you can create a new record. In a form, clicking this icon displays a form with empty fields that you can fill in to create a new record.
	The double plus (++) icon adds an existing record.
	The arrow-pointing-to-a-box icon saves the selected record.
	The arrow-pointing-up-and-back icon cancels modifications to the selected record.
	The Trash Can icon deletes the selected record.
	The Magnifying Glass icon starts a query in a form or list so that you can specify query criteria. For more information about querying, see Chapter 7, "Using Query to Locate Information."

Using the Site Map

Your organization determines the screens that appear in the application window. These screens might be only a subset of the available screens. You access a screen by clicking the Side Menu icon (shown in Figure 3–2) on the application banner, and then selecting the screen name from the list of screen names. You can also use the Site Map to access the screen.

If the screen name that you want does not appear in the list of screen names for the Side Menu icon, then you can show that screen name with the other screen names so that you can easily access the screen. For more information about specifying the

screens that appear in the Siebel application, see "Showing, Hiding, and Reordering Screens or Views" on page 14-10.

To see a list of all the screens available to you, use the Site Map as shown in the following procedure.

To navigate to a screen using the Site Map

1. Do one of the following:

    ■   From the application-level menu, choose Navigate, then Site Map.

    ■   Click the Site Map button on the application toolbar.

        For more information about the application toolbar, see "About the Application-Level Menu" on page 3-3.

2. (Optional) To restrict the hyperlinks that appear in the Site Map, enter appropriate text in the field for searching.

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

    The Site Map displays the screen name and all the view names available in that screen. You can click the return-to-top button next to the screen name to return to the top of the Site Map.

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

About the Saved Queries Drop-Down List

You can select saved queries from the drop-down list for the Saved Queries field on the menu toolbar (shown in Figure 3–3). In this list, you can access your saved queries and the predefined queries established by your organization. For more information about the menu toolbar, see "About the Menu Toolbar" on page 3-4.

Figure 3–3 also shows an example of the drop-down list for the Saved Queries field in the menu toolbar. For more information about saved queries, see Chapter 7, "Using Query to Locate Information."

About the Query Control

You can access the query control (shown in Figure 3–4) by clicking the Magnifying Glass icon on the menu toolbar (shown in Figure 3–3). For more information about the menu toolbar see "About the Menu Toolbar" on page 3-4.

Figure 3–4   Example of a Query Control

Within the query control, you access the drop-down list for record fields, which helps you narrow your query criteria. For more information about querying, see Chapter 7, "Using Query to Locate Information."

About Sending Messages

You can send messages by clicking the Send (or Share) icon on the menu toolbar (shown in Figure 3–3). For more information about the menu toolbar, see "About the Menu Toolbar" on page 3-4.

Alternatively, you can send messages by choosing File on the application-level menu. For more information, see "Emailing, Faxing, Paging, and Sending Outbound Wireless Messages" on page 11-3.

Figure 3–5 shows the icons for sending messages.

Figure 3–5   Siebel Application: Icons for Sending Messages

After you click the Send icon on the menu toolbar, the following icons appear, from left to right:

- **Email messages icon.** Click this icon to send email messages. On some screens, the Pick Recipient dialog box might appear. After you select a recipient in the Pick Recipient dialog box, and click OK, the Send Email dialog box appears. You prepare the email message in this dialog box, and then click Send. For more information, see "Sending Email from the Siebel Application" on page 11-3.

- **Faxes icon.** Click this icon to send faxes. On some screens, the Pick Recipient dialog box might appear. After you select a recipient in the Pick Recipient dialog box, and click OK, the Send Fax dialog box appears. You prepare the fax in this dialog box, and then click Send.

- **Pages icon.** Click this icon to send pages. The Send Page dialog box appears. You prepare the page in this dialog box, and then click Send.

- **Outbound wireless messages icon.** Click this icon to send outbound wireless messages. On some screens, the Pick Recipient dialog box might appear. After you select a recipient in the Pick Recipient dialog box, and click OK, the Send Wireless Message dialog box appears. You prepare the outbound wireless message in this dialog box, and then click Send.

Accessing the Communications Panel

You can access the communications panel by clicking the Communications icon on the menu toolbar (shown in Figure 3–3) of the Siebel Open UI Client. For more information about the menu toolbar, see "About the Menu Toolbar" on page 3-4.

The communications panel (shown in Figure 3–6) contains a header area, the communications toolbar, the customer dashboard, and the chat panel. Your communications panel might not contain all of these elements, depending on your deployment the Siebel Open UI Client. For more information about the communications panel and the communications toolbar, see *Siebel CTI Administration Guide.* For more information about the chat panel and the customer dashboard see *Siebel Chat Guide*.

The communications panel can appear in a docked position or as a floating pane in the Siebel Open UI Client. You can dock and undock it by clicking the dock icon. When the communications panel is floating, you can dragged it anywhere within the confines the main Siebel Open UI Client area.

You can control the size of the communications panel by clicking the Show More and Show Less icons. You can close the communications panel by clicking the Close (X) icon.

Figure 3–6   Example of the Communications Panel
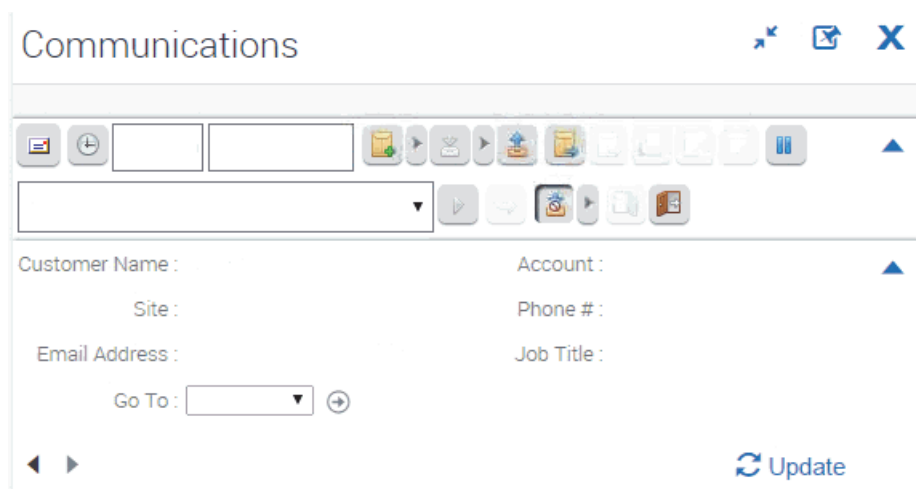
Using and Saving Charts

Data can appear in chart format (shown in Figure 3–7). Charts are graphical representations of data and are available as views in some screens. Use charts to compare data sets. Typically, you can access a chart from the second level view bar.

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

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

Figure 3–7   Example of a Chart
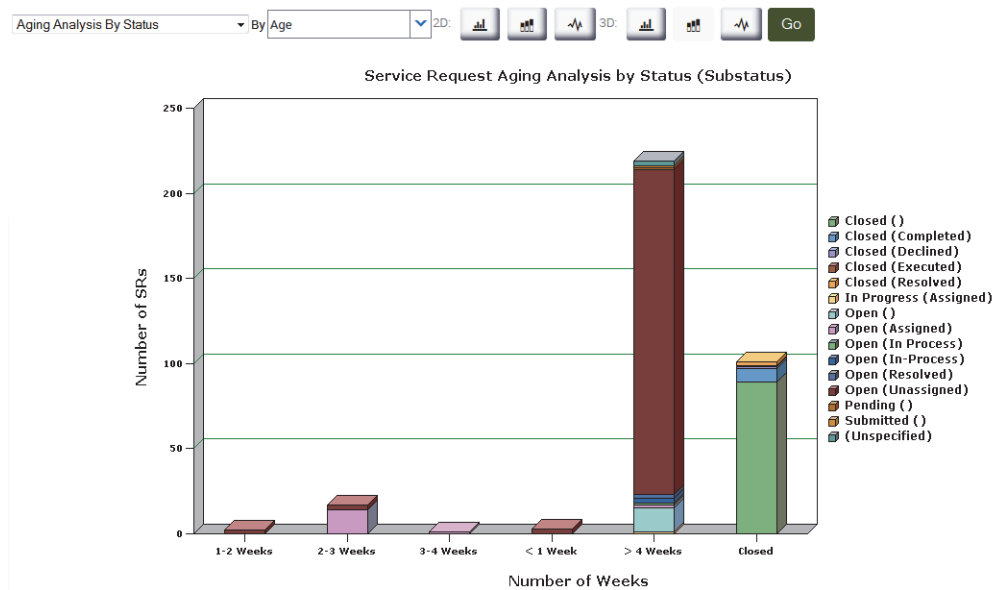
To save a chart

1. Navigate to the chart you want to save.

2. Right-click the chart, and select Save Image As.

3. In the dialog box that appears, do the following:

   a. Navigate to the location where you want to save the chart.

      Do not change the default file name, or enter a new name in the File name field.

   b. Select an image type from the drop-down list for the Save as type field.

   c. Click Save.

About the Action Pane

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

- Click the appropriate button on the application toolbar.

  These buttons include the How Do I button and the Tasks button.

- From the application-level menu, choose View, then Action Pane. The menu items include iHelp and Tasks.

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

About Explorer Views

An explorer view (shown in Figure 3–8) displays data in a compact hierarchical format. Typically, you can access an explorer view from the second level view bar.

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

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

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

Figure 3–8   Example of an Explorer View
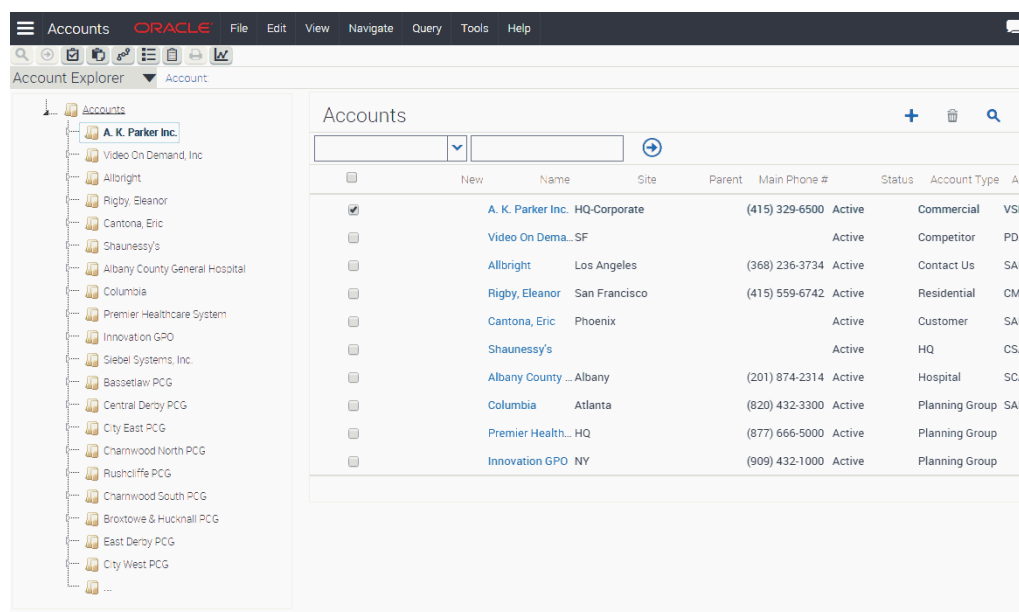
About Keyboard Navigation

The following keys facilitate keyboard navigation in Siebel Business Applications:

- **TAB and TAB+SHIFT.** Press TAB to navigate forward and TAB+SHIFT to navigate backward between widgets (interface elements, such as the application-level menu and the application toolbar).

- **Arrow keys.** Press the arrow keys to navigate within a widget (such as within a list applet, within a form applet, within a drop-down list, and so on).

- **ENTER.** Press ENTER to navigate to the screen if the focus is on the screen or to navigate to the view if the focus is on the view.

- **ENTER key behavior in applets and dialog boxes.** Pressing ENTER while focusing on a control button results in the same behavior as clicking the control button.

- **ESC.** Press ESC to close an interface element, such as a calendar control, a calculator control, and so on, without saving changes in the interface element.

Also, press ESC to cancel an operation, such as an operation to create a query or to create a new record.

- **ESC key behavior in applets and dialog boxes.** A confirmation message appears (showing the OK and Cancel buttons) when a user closes a dialog box by clicking the Close (X) icon in the upper right corner of the dialog box.

  - Press ENTER to close the confirmation message and the dialog box.

  - Press ESC to close the confirmation message and return to the original dialog box.

- **ESC key and Undo.** Pressing ESC once performs a single undo operation. Pressing the Undo key multiple times might generate multiple results depending on the user's previous activity, including which user interface elements the user has interacted with.

You can also use keyboard shortcuts to navigate in the user interface, but you might find these keys easier to remember and use than keyboard shortcuts. For more information about keyboard shortcuts, see Chapter 15, "Using Keyboard Shortcuts."

About Siebel User Interface Behavior

Some issues to note about the Siebel user interface behavior include the following:

- **Closing the browser.** Exiting the browser by clicking the Close (X) icon in the upper right corner of the window rather than explicitly using the Log Out button is not supported. It is recommended to set session time-out intervals as short as possible while maintaining usability and to train users to log out of the application by using the Log Out button.

- **Drilldown behavior.** Drilldown behavior is supported by all form applets. However, note the following:

  - **Drilldown from Find** is not supported for multiple results. Only a single result is supported for drilldown.

  - **Drilldown in a Query** is not supported. In a Query, results are returned in a field which is editable and this does not allow drilldown.

  - **Drilldown from the List view** changes focus to the detail applet on the detail view. Since the focus is usually on the second applet (for example, detail activities), Siebel attempts to show the entire applet. This might result in part of the title and some buttons in the title area being hidden. You can press Page Up to immediately see the top applet header information or scroll using the mouse tablet or keyboard actions. You can modify this behavior by doing the following:

    * Reducing the number of rows displayed in the detail applet thereby allowing the view to render with everything visible initially.

    * Changing the focus to the top applet in the detail view by controlling the focus behavior. For more information about controlling the focus behavior, see article 1622877.1 (Doc ID) on My Oracle Support.

- **Lock.** The lock option is not supported in hierarchical list applets.

- **Pick lists and LOV's.** Pick lists and LOVs do not select a new value until a unique match is made. If you are using auto-fill but an exact match is not made, then the value reverts to the original. Double-quotes are not included when you select from an LOV.

■ **Quotes.** Quotes are not included when you select an option from an LOV. Double quotes are required for strings.

About the Simplified User Interface

The Simplified User Interface is available as an alternative theme for the Siebel Open UI client. Although the Simplified UI is not the default theme, you can configure the Siebel Open UI client to use this theme. For information about setting themes, see "Setting Themes" on page 14-4.

The main elements of a home page using the Simplified UI theme are as follows:

■ The home page contains familiar elements, such as, My Quotes and the menu toolbar.

■ On the right side of the screen are a series of Springboard icons (such as, Home, Accounts, Contacts, Calendar, Opportunities, and so on) that you can click or tap to access a particular screen.

After you choose a screen, you can access available views using the floating side drawer on the right side of the screen.

Additionally, Springboard icons appear within a horizontal scroll list above the selected screen, and the buttons in the application toolbar appear when you click the icon next to the Oracle logo.

4

About Records, Fields, and Field Controls

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

- About Records
- About Fields
- About Text Fields
- About Field Controls
- About Check Boxes
- About Option Buttons
- About Drop-Down Lists
- About Field Control Buttons
- About the Calculator
- About the Calendar Control
- About the Currency Calculator

About Records

A record is a group of related data organized into fields. For example, information about a contact, such as the last name, first name, address, and phone number, makes up a contact record. A record can appear in a list of related records, such as a list of contact records, or it can appear individually in a form.

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

Related Topics

- "Horizontal Scrolling in Lists" on page 3-8
- "Using Field Hyperlinks in Records" on page 6-9
- "Organizing List Columns" on page 6-15

About Fields

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

Required Fields

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

Read-Only Fields

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

Maximum Number of Characters

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

Resizing the Notes Field

You can dynamically size the Notes field so that it is in line with the user interface. However, be aware that resizing the Notes field might result in dynamically changing the screen layout.

About Text Fields

You can type text directly into a text field (shown in Figure 4–1). You click in the field before typing this text.

Figure 4–1   Example of a Text Field in a Form

Name:★ | 1st Quarter
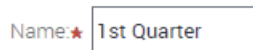
To more easily enter text in text fields that can contain a large amount of text, you can click and drag the resizing indicator in the bottom right corner of the field to make the field larger. You can also use the resizing indicator (shown in Figure 4–2) to make the field smaller. In some browsers, you must click in the text field to see the resizing indicator.

Figure 4–2   Example of the Resizing Indicator for a Text Field

Description: | 1st quarter opportunities summary
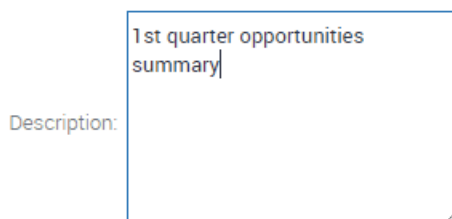
Developers can customize the Siebel application to save or to not save the size of a field that you resize. They can also customize the Siebel application to not use this resize feature for fields.

About Field Controls

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

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

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

Related Topics

- "About Check Boxes" on page 4-3
- "About Option Buttons" on page 4-3
- "About Drop-Down Lists" on page 4-4
- "About Field Control Buttons" on page 4-4

About Check Boxes

Click the box next to or below an option to select or clear the check box (shown in Figure 4–3). When you click an empty box, a check mark or an X appears in the box. If you click a box that is selected, then the check mark or X disappears.

Figure 4–3   Example of Check Boxes
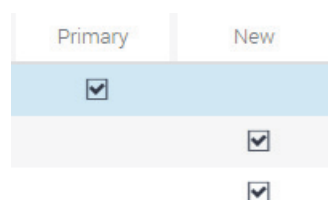
In query mode, check boxes have a third possible state. For more information about using check boxes in query mode, see "Tips for Queries" on page 7-10.

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

About Option Buttons

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

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

Figure 4–4   Example of Option Buttons
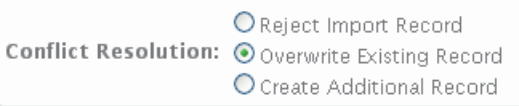
About Drop-Down Lists

A drop-down list (shown in Figure 4–5) allows you to click a down arrow to the right of a field to select from a list of available values. You can type the field value in a field for drop-down list. You can also type part of the text string for a field value to automatically decrease the number of available values that appears in the drop-down list for the field, and then you can select the appropriate value for the field.

Figure 4–5   Example of a Drop-Down List
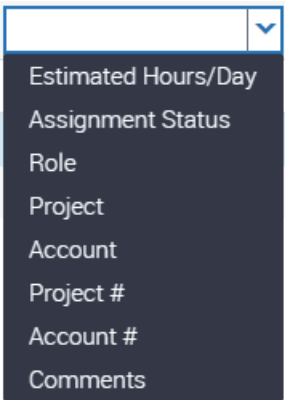
About Field Control Buttons

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

Table 4–1   Description of Field Control Buttons

Button	Name	Description	Related Topic
	Calculator button	Launches a calculator for entering amounts.	"About the Calculator" on page 4-6
	Calendar select button	Launches a calendar control for entering a date and optionally, time, in a date or date and time field. You can also type a date (or date and time) directly into a field.	"About the Calendar Control" on page 4-5
	Currency calculator button	Launches the currency calculator.	"About the Currency Calculator" on page 4-7
	Multiple select button	Launches a multiple selection dialog box.	"Associating Records Using a Multiple Selection Dialog Box" on page 5-3
	Single select button	Launches a single selection dialog box.	"Associating Records Using a Single Selection Dialog Box" on page 5-1

Table 4–1   (Cont.) Description of Field Control Buttons

Button	Name	Description	Related Topic
📞	Telephone button	Launches the default telephone application on for your device. This feature is device-dependent.	None

About the Calendar Control

You use the calendar control (shown in Figure 4–6) to select date and time information for a field. You access the calendar control by clicking the calendar select button in a date field or a date and time field.

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

Figure 4–6   Example of the Calendar Control
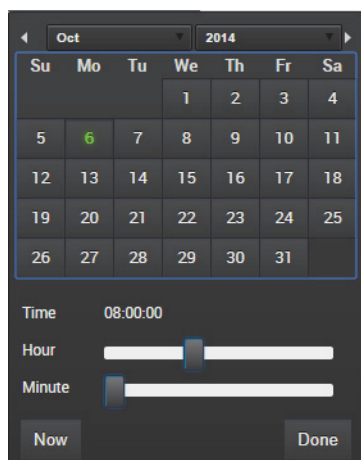
Table 4–2 describes each element of the calendar control.

Table 4–2   Description of Calendar Control Elements

Element	Description
Month and Year	Shows the month and year. Use the left and right arrows to navigate to the previous and next month. Use the drop-down arrow next to the month to select a different month, and use the drop-down arrow next to the year to select a different year.
Calendar	Shows the calendar for the month. Use the calendar to select a date by clicking the date in the calendar.
Time field	Shows the time. This field appears only if you access the calendar control for a field that requires a time.
Hour slide bar	Sets the hour in the Time field. This field appears only if you access the calendar control for a field that requires a time.
Minute slide bar	Sets the minute in the Time field. This field appears only if you access the calendar control for a field that requires a time.
Now button	Sets the value for a date field to the current date and the value for a date and time field to the current date and time.

Table 4–2   (Cont.) Description of Calendar Control Elements

Element	Description
Done button	Saves your selections. If you do not want to save your selections, then click outside of the control to cancel your selections.

Note the following about selecting a date:

■   When you query a date field that has a calendar select button to display the calendar control, then you must include the date field value in quotes if you execute the query without specifying a time. For more information about entering query criteria, see "Simple Query Operators" on page 7-7.

■   Planned Start is a date and time field (not just a date field), and this allows a high granularity when searching.

■   When specifying a date and time, the calendar control remains open until Done is selected.

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

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

About the Calculator

You access the calculator (shown in Figure 4–7) by clicking the calculator button that appears in a field for an amount.

Figure 4–7   Example of the Calculator
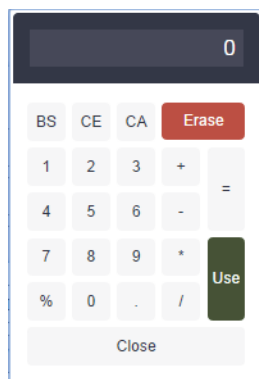
About the Currency Calculator

You access the currency calculator (shown in Figure 4–8) by clicking the dollar sign button that appears in a field for a currency amount. You can use the currency calculator to specify financial transaction information in foreign currencies.

Table 4–3 describes each field control in the currency calculator.

Figure 4–8   Example of the Currency Calculator

Table 4–3   Description of Currency Calculator Fields

Field	Field Control	Description
Currency Code	Single select button	Launches a dialog box where you can select the country and currency code.
Exchange Date	Calendar select button	Launches the calendar control where you can select the exchange date. The field does not appear in all currency calculators. For more information about the calendar control, see "About the Calendar Control" on page 4-5.
Amount	Calculator button	Launches the calculator where you can enter the amount. You can also type the amount directly into the field. For more information about the calculator, see "About the Calculator" on page 4-6.

5

Using Selection Dialog Boxes

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

- Launching Selection Dialog Boxes
- Associating Records Using a Single Selection Dialog Box
- Associating Records Using a Multiple Selection Dialog Box
- Querying for Records in a Selection Dialog Box
- Finding Records in a Selection Dialog Box

Launching Selection Dialog Boxes

Buttons launch selection dialog boxes. Table 5–1 describes these buttons.

Table 5–1   Description of Select Buttons

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

Single selection dialog boxes allow you to add only one record to a field. In some cases, you can create a new record from the single selection dialog box.

Multiple selection dialog boxes allow you to select multiple records and add them to a field. In some cases, you can create a new record from the multiple selection dialog box.

Associating Records Using a Single Selection Dialog Box

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

Figure 5–1 shows an example of a single selection dialog box.

Figure 5–1 Example of a Single Selection Dialog Box

Associating Records with Existing Records in a Single Selection Dialog Box

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

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

1. Navigate to the appropriate screen.

2. Select the record you want to associate with another record.

3. Click the single select button in the appropriate field.

   A single selection dialog box appears.

4. In the dialog box, locate and select the record you want to associate with the existing record.

5. Click OK.

Associating Records with New Records in a Single Selection Dialog Box

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

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

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

1. Navigate to the appropriate screen.

2. Select the record you want to associate with a new record.

3. Click the single select button in the appropriate field.

   A single selection dialog box appears.

4. Click the plus (+) icon.

   The form for the new record appears.

5. In the form, enter the information for the new record, and click the arrow-pointing-to-a-box icon.

   The new record appears in the single selection dialog box, and this new record is selected.

6. Click OK.

Associating Records Using a Multiple Selection Dialog Box

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

Figure 5–2 shows an example of a multiple selection dialog box.

Figure 5–2   Example of a Multiple Selection Dialog Box
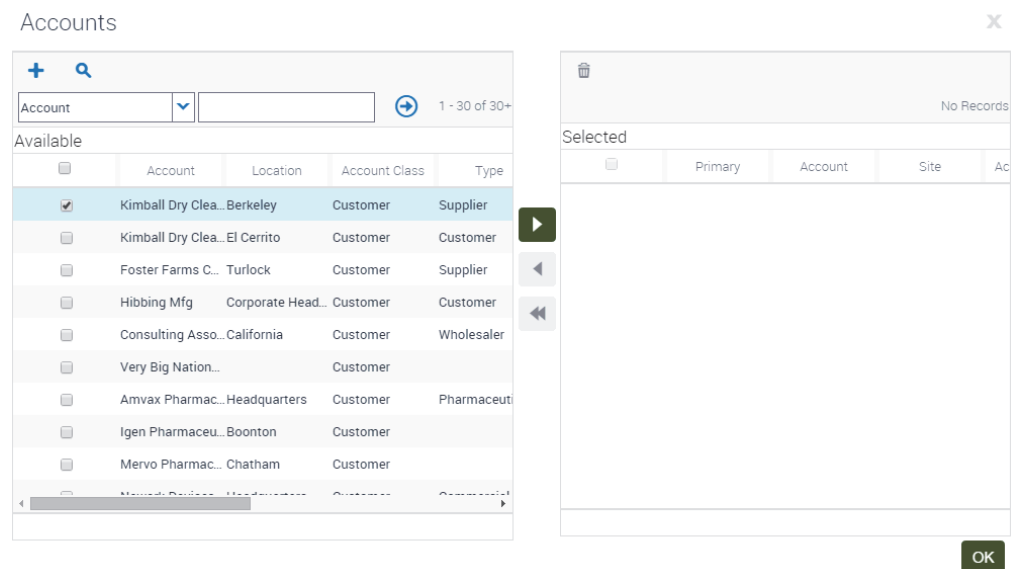
Associating Records with Existing Records in a Multiple Selection Dialog Box

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

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

1. Navigate to the appropriate screen.

2. Select the record you want to associate with other records.

3. Click the multiple select button in the appropriate field.

A multiple selection dialog box appears showing the list of available records and a list of selected records for the field.

4. In the list of available records, select the record you want to associate with the current record, and click the move right button to move the record to the list of selected records.

Note: You can select multiple records by holding down the CTRL key and clicking each record. To select records that are contiguous, you can select the first record, hold down the SHIFT key, and select the last record.

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5. (Optional) If you want to remove one or more records in the list of selected records, select the records, and click the move right button to move the records back to the list of available records.

6. Click OK.

Associating Records with New Records in a Multiple Selection Dialog Box

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

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

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

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

1. Navigate to the appropriate screen.

**2.** Select the record you want to associate with a new record.

3. Click the multiple select button in the appropriate field.

A multiple selection dialog box appears showing the list of available records and a list of selected records for the field.

4. Click the plus (+) icon.

The form for the new record appears.

5. In the form, enter the information for the new record, and click the arrow-pointing-to-a-box icon.

The new record appears in the list of selected records, and this new record is selected.

6. Click OK.

Querying for Records in a Selection Dialog Box

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

To query for records in a selection dialog box

1. In the selection dialog box, click the Magnifying Glass icon.

    A blank row appears in the selection dialog box.

2. Enter your query criteria in the appropriate fields.

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

    If you query a data field that has a calendar select button to display the calendar control, then you must include the date field value in quotes if you execute the query without specifying a time. For more information about entering query criteria, see "Simple Query Operators" on page 7-7.

3. Click the right-arrow-in-a-circle icon.

    The records matching your query criteria appear.

Finding Records in a Selection Dialog Box

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

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

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

To find records in a selection dialog box

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

    In a multiple selection dialog box, the drop-down list for record fields appears above the list of available records, and not above the list of selected records.

    > **Note:** In the selection dialog box, you cannot select a date field.

2. Type the text you want to search for in the field for a search value.

    The field for a search value appears to the right of the drop-down list for record fields. A wildcard is automatically assumed at the end of text you enter in the field for a search value. If you search for *Siebe*, then all words beginning with the letters *Siebe* are found.

Search queries in pick lists are not case sensitive.

3. Click the right-arrow-in-a-circle icon.

The records matching your criteria appear.

6

Completing Common Record Tasks

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

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

Creating Records

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

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

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

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

Creating Records Using the Plus (+) Icon

You can create a record using the plus (+) icon.

To create a record using the plus (+) icon

1. In the list or form, click the plus (+) icon.

   A new record appears.

2. Enter the appropriate data, and save the record.

Creating Records Using the Cogwheel Icon

You can create a record using the Cogwheel icon.

To create a record using the cogwheel icon

1. In the list or form, click the Cogwheel icon, and then click New Record.

   A new record appears.

2. Enter the appropriate data, and save the record.

Creating Records Using the Application-Level Menu

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

To create a record using the application-level menu

1. In the list or form, choose Edit, then New Record from the application-level menu.

   A new record appears.

2. Enter the appropriate data, and save the record.

Related Topics

- "Associating Records Using a Single Selection Dialog Box" on page 5-1
- "Associating Records Using a Multiple Selection Dialog Box" on page 5-3
- "Copying Records" on page 6-4

Using Quick Fill to Create Records

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

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

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

After you create a set of templates, you might want to delete the templates you no longer use or to rename some of the templates. You can perform these tasks in your user preferences. For more information, see "Maintaining Quick Fill Templates" on page 14-15.

Creating Quick Fill Templates

You can create a new quick fill template.

To create a quick fill template

1. In a form, create a new record.

    You will not save this new record.

2. Complete all the record fields for which you want to define default values.

3. In the form, click the Cogwheel icon, and then click Save as Template.

    The Save Template As dialog box appears.

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

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

5. Click Save.

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

    a. Click OK on the Siebel message dialog box.

    b. To overwrite the existing template, click Overwrite.

    c. To save the template with a different name, type a new name in the Template Name field, and click Save.

7. Delete the new record.

Applying Quick Fill Templates to New Records

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

To apply a quick fill template to a new record

1. In a form, create a new record.

2. In the form, click the Cogwheel icon, and then click Apply Template.

   The Pick Template dialog box appears.

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

3. In the Template list, select the template you want to use, and click OK.

   The values defined in the quick fill template are populated in the record.

Using Quick Fill Templates to Create Records

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

To use a quick fill template to create a record

1. In a form, click the Cogwheel icon, and then click New From Template.

   The Pick Template dialog box appears.

2. In the Template list, select the template you want to use, and click OK.

   A new record appears. The values defined in the quick fill template are populated in the record.

Creating Records by Using the Last Quick Fill Template

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

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

- In a form, click the Cogwheel icon, and then click New From Last Template.

   A new record appears. The values defined in the quick fill template that you last used are populated in the record.

Copying Records

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

To copy a record

1. Find and select the record you want to copy.

2. Complete either of the following steps:

   - Click the Cogwheel icon, and then click Copy Record.
   - From the application-level menu, choose Edit, then Copy Record.

   A new record with copied data appears.

3. Change the fields in the new record as needed, and step off the record to save your changes.

Editing Records

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

To edit a record

1. Find and select the record you want to change.

2. Change the fields in the record, and step off the record to save your changes.

Changing Multiple Records

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

Figure 6–1   Example of the Change Records Dialog Box

To change multiple records

1. Navigate to the screen.

2. Select the records you want to change by holding down the CTRL key and clicking each record.

   To select records that are contiguous, you can select the first record, hold down the SHIFT key, and select the last record.

3. Click the Cogwheel icon, and then click Change Records.

   The Change Records dialog box appears.

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

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

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4. From the Field drop-down list, select the field in which you want to change data.

5. Enter the new data in the corresponding Value field.

   Repeat steps 4 and 5 until you enter all of the information you want to change in your selected records.

6. Click OK to apply the changes.

Saving Records

You can save records in several ways.

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

To save a record

- When you finish editing or adding a record in a form or list, do one of the following:

  - Step off the record to commit the changes to the database.

    Stepping off the record means leaving it in any way, such as by moving to another record or by using the record navigation buttons.

  - Click the Cogwheel icon, and then click Save Record.

  - From the application-level menu, choose Edit, then Save Record.

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

Canceling Changes to Records

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

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

To cancel changes to a record

- Complete either of the following steps:

  - Click the Cogwheel icon, and then click Undo Record.

  - From the application-level menu, choose Edit, then Undo Record.

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

Deleting Records

You can delete a record by using the Trash Can icon, the Cogwheel icon in a list or form, and the application-level menu. Only one record can be deleted at a time.

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

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

Deleting Records Using the Trash Can Icon

You can delete a record using the Trash Can icon.

To delete a record using the Trash Can icon

1. Select the record you want to delete.

   In a list, the selected record is highlighted.

2. Click the Trash Can icon.

   A dialog box appears, asking you to confirm the deletion.

3. Click OK to delete the record.

Deleting Records Using the Cogwheel Icon

You can delete a record using the Cogwheel icon.

To delete a record using the Cogwheel icon

1. Select the record you want to delete.

   In a list, the selected record is highlighted.

2. Click the Cogwheel icon, and then click Delete Record.

   A dialog box appears, asking you to confirm the deletion.

3. Click OK to delete the record.

Deleting Records Using the Application-Level Menu

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

To delete a record using the application-level menu

1. Select the record you want to delete.

   In a list, the selected record is highlighted.

2. From the application-level menu, choose Edit, then Delete Record.

   A dialog box appears, asking you to confirm the deletion.

3. Click OK to delete the record.

Associating Records with Other Records

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

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

To associate a record with another record

1. Navigate to the appropriate screen.

2. Drill down on a field in the record with which you want to associate another record.

3. Navigate to the appropriate view.

   The selected view appears.

4. In the selected view, click the plus (+) icon.

   A new record or a selection dialog box appears.

5. Do one of the following:

   - Complete the fields of the new record to add a new record.

   - From the selection dialog box, select a record, and click OK to add a new record.

Related Topics

- "Creating Records" on page 6-2

- "Associating Records Using a Single Selection Dialog Box" on page 5-1

- "Associating Records Using a Multiple Selection Dialog Box" on page 5-3

Printing Records

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

- **Running a report.** You can print records by running and then printing a report. For more information about reports, see "Running Reports" on page 11-2.

- **Browser print.** You can use the print feature for the browser to print an image of the current screen. If you want to print a screen that contains colors, then you can use the color printing feature for your browser. Color printing is important for screens in which colors signify meaning, such as calendar screens and notification screens.

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

Using Field Hyperlinks in Records

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

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

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

Displaying Record Count

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

To display a record count

1. (Optional) Execute a query.

2. Click the Cogwheel icon, and then click Record Count.
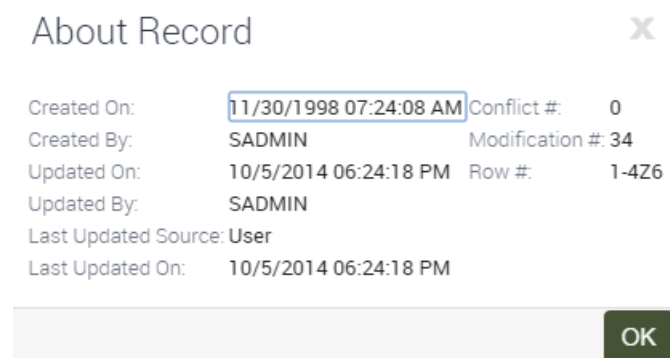
   The Record Count dialog box appears.

   ■ If you do not execute a query, then this dialog box shows the total number of records in the active list.

   ■ If you execute a query, then this dialog box shows the total number of records that match your query criteria.

Finding Information About Records

You can view information about a record in the About Record dialog box (shown in Figure 6–2).

Figure 6–2 Example of the About Record Dialog Box

To find information about a record

1. Navigate to and select the record.

2. Click the Cogwheel icon, and then click About Record.

   The About Record dialog box appears.

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

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

3. Click OK to close the dialog box.

About Accessing the About Record Dialog Box After a Merge

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

Identifying New Records

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

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

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

To identify a new record

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

Flagging Records

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

To flag a record

1.   Navigate to the record you want to flag.

2.   In the Priority Flag field of the record, select the check box.

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

The Priority Flag field is not available in all views. If you cannot see a Priority Flag field for the record, then check your Columns Displayed settings. For information about showing and hiding columns, see "Organizing List Columns" on page 6-15.

Adding Notes to Records

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

In the Notes view, you can enter public notes or private notes. Anyone who can access the record can see a public note for the record. Only the person who enters the note can see a private note.

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

To add a note to a record

1.   Find and drill down on a field in the record to which you want to add a note.

2.   Navigate to the Notes view, and then navigate to the Private Notes subview or the Public Notes subview.

3.   Click the plus (+) icon.

A new record appears.

4.   From the drop-down list for the Type field, choose Note.

5.   In the Description field, enter the text for the note.

Merging Duplicate Records

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

When you use the Merge Records command, the Merge Records dialog box appears (shown in Figure 6–3).

Figure 6–3   Example of the Merge Records Dialog Box
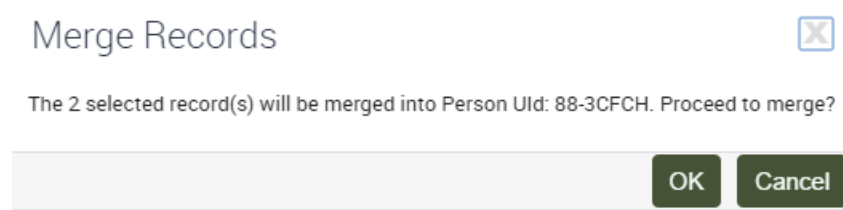
If other records are associated with the records you merge, then those records are associated with the surviving record. Any duplicate associated records are deleted.

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

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

To merge two records

1. Click the record that is the source record.

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

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

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

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

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

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

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

Attaching Files to Records

When the Attachments view is available within a screen, you can attach a file to a record. You can attach files such as Microsoft Outlook email messages, Microsoft Word

documents, and image files. The Attachments view allows others who work with the record to access the attachment so that they see the latest information.

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

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

Users can edit attachments in Siebel Open UI only if Java is available on the client computer. If not, then users must download the document to a secure location specified by the browser, and upload the edited document thereafter. If Java is available on the client computer, then users can edit and save documents in Siebel Open UI without an intermediate save location.

Attaching Files to Records Using the New File Button

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

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

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

2. Navigate to the Attachments view.

   The Attachments list appears.

3. Click New File.

   A dialog box appears.

4. Locate and select the file you want to attach to the record, and then click Open.

   > **Note:** You can select multiple files by holding down the CTRL key and clicking each file. To select files that are contiguous, you can select the first file, hold down the SHIFT key, and select the last file.

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

5. Complete additional fields as necessary.

   Some fields are described in the following table.

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

Attaching Files to Records Using the Cogwheel Icon

You can create a file attachment using the Cogwheel icon in the Attachments view.

To attach a file to a record using the Cogwheel icon

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

2. Navigate to the Attachments view.

The Attachments list appears.

3. Click the Cogwheel icon, and then click New Record.

A new record appears.

4. In the Attachment Name field, click the select button.

The Add Attachment dialog box appears.

5. Click Browse to locate and select the file you want to attach to the record, and then click Open.

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

Attaching Files to Records Using Drag-and-Drop

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

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

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

2. Navigate to the Attachments view.

The Attachments list appears.

3. Locate the file you want to attach to the record.

4. Click the file to select it, and drag the file to the Attachments list.

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

Attaching URLs to Records

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

Attaching URLs to Records Using the New URL Button

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

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

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

2. Navigate to the Attachments view.

The Attachments list appears.

3. Click New URL.

The Add URL dialog box appears.

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

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

Attaching URLs to Records Using the Cogwheel Icon

You can create a URL attachment using the Cogwheel icon in the Attachments view.

To attach a URL to a record using the Cogwheel icon

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

2. Navigate to the Attachments view.

   The Attachments list appears.

3. Click the Cogwheel icon, and then click New Record.

   A new record appears.

4. In the Attachment Name field, click the select button.

   The Add Attachment dialog box appears.

5. Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click the arrow-pointing-to-a-box icon to save the record.

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

Organizing List Columns

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

Figure 6–4 shows an example of the columns displayed dialog box.

Figure 6–4   Example of the Columns Displayed Dialog Box
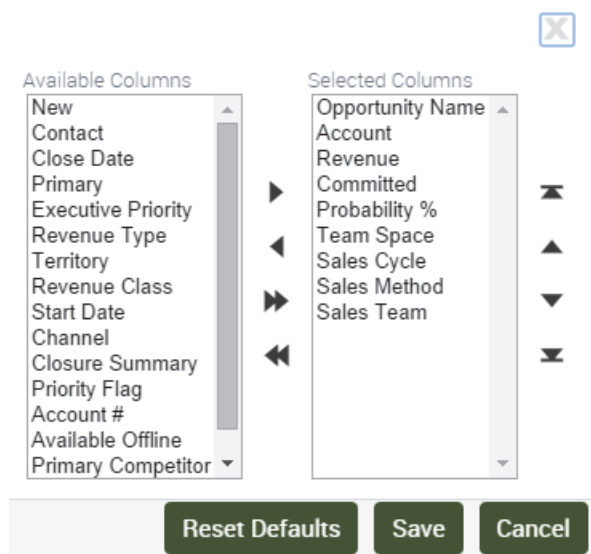
To organize columns in a list

1. In a list, click the Cogwheel icon, and then click Columns Displayed.

   The Columns Displayed dialog box appears.

2. Select one or more columns in one of the lists (Available Columns or Selected Columns).

3. Click the buttons between the Available Columns list and the Selected Columns list to show or hide the columns you select.

The buttons are described in the following table.

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

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

The buttons are described in the following table.

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

5. Click Save.

Sorting List Columns

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

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

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

Figure 6–5 shows an example of a sort arrow in a column header.

Figure 6–5   Example of a Sort Arrow in a Column Header

Opportunity Name▲

> **Note:**   The sort order resets when you leave a screen, unless you save the sort order as part of a query. This option is available only for *My* views. For more information about querying, see Chapter 7, "Using Query to Locate Information."

Sorting a Single List Column

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

To sort a single column

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

2. Click Sort.

    The column is sorted in ascending or descending order.

3. Click the column header again.

4. Click Sort.

    The column is sorted in the opposite order.

Performing an Advanced Sort in Lists

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

To perform an advanced sort in a list

1. In a list, click the Cogwheel icon, and then click Advanced Sort.

    The Sort Order dialog box appears (shown in Figure 6–6).

2. From the drop-down list for the Sort By field, select the first column to sort by.

3. From the drop-down list for the first Then By field, select the second column to sort by.

4. From the drop-down list for the second Then By field, select the third column to sort by.

5. Use the Ascending and Descending option buttons to define the sort order for each column you select for the advanced sort.

6. Click OK.

    The columns are sorted in the order you specify.

Locking List Columns

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

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

> **Note:**   You cannot edit or query locked columns. The lock option is not supported for hierarchical list applets.

Figure 6–7 shows an example of a list view with locked columns.

Figure 6–7   Example of a List View with Locked Columns

To lock list columns

1. Navigate to the list in which you want to lock columns.

2. Click the header on the right-most column of the group of columns that you want to lock.

3. Click Lock.

The locked column headers appear with a darker gray background and have a lock icon. You can scroll to the right to view columns without losing focus of the locked columns on the left.

4. To unlock the columns, click the header of the right-most locked column, then click Unlock.

Resizing List Columns

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

To resize columns

1. Place the cursor over the right header divider for the column you want to resize.

   A resize arrow appears.

2. Click and drag the column divider to the right to widen the column, or to the left to narrow the column.

7

Using Query to Locate Information

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

- About Queries
- About Common Buttons in Queries
- Creating Queries for Records
- Finding Records in Lists
- Refining Queries
- Deleting Queries
- Canceling Long-Running Queries
- Using the Query Assistant
- About Using Default Queries
- About Querying a Telephone Number
- Simple Query Operators
- Compound Query Operators
- Tips for Queries

About Queries

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

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

Predefined Queries

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

For example, if you always work with accounts located in California, then the drop-down list for the Saved Queries field might contain a PDQ called CA Accounts that finds all the accounts in California. Each time you want to see only the California

accounts, you do not have to create a new query. Instead, you can select the predefined CA Accounts query from the drop-down list for the Saved Queries field.

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

To execute a predefined query

- Do one of the following:
  - Click the Execute Query button on the application toolbar to execute a predefined query.

    For more information about the Execute Query button on the application toolbar, see "About the Application Toolbar" on page 3-4.
  - Use the appropriate keyboard shortcut (ALT+R).

Case Insensitive and Accent Insensitive Queries

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

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

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

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

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

About Common Buttons in Queries

When performing a query, buttons appear at the top of lists and forms. Table 7–1 describes these buttons. Your Siebel application might contain additional buttons or other elements on each list and form.

Table 7–1   Common Buttons in Queries

Button	Description
	The portrait icon launches the query assistant. For more information about the query assistant, see "Using the Query Assistant" on page 7-5.
	The right-arrow-in-a-circle icon executes the query.
	The X-in-a-circle icon cancels the query.

Creating Queries for Records

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

To create a query for records

1. Navigate to the screen.

2. Do one of the following:

    ■   In the list or form, click the Magnifying Glass icon.

    ■   In the list or form, click the Cogwheel icon, and then click New Query.

    ■   From the application-level menu, choose Query, then New Query.

    ■   From the application toolbar, click the New Query button.

    ■   Use the appropriate keyboard shortcut.

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

3. Enter the query criteria in the appropriate fields.

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

    If you query a data field that has a calendar select button to display the calendar control, then you must include the date field value in quotes. For more information about entering query criteria, see "Simple Query Operators" on page 7-7.

4. Do one of the following:

    ■   In the list or form, click right-arrow-in-a-circle icon.

    ■   In the list or form, click the Cogwheel icon, and then click Run Query.

    ■   From the application-level menu, choose Query, then Run Query.

    ■   From the application toolbar, click the Run Query button.

    ■   Use the appropriate keyboard shortcut.

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

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

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

         The Save Query As dialog box appears.

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

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

Finding Records in Lists

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

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

To find records in a list

1. Navigate to the screen.

2. In the list header, select a field you want to search from the drop-down list for record fields.

> **Note:** In the list header, you cannot select a date field.

3. In the list header, type the text you want to search for in the field for a search value.

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

4. Click the right-arrow-in-a-circle icon.

The records that match the criteria appear.

Refining Queries

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

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

To refine a saved query

1. Navigate to the screen.

2. From the drop-down list for the Saved Queries field, select the query.

The records meeting the query criteria appear.

3. Do one of the following:

- In a list or form, click the Cogwheel icon, and then click Refine Query.
- From the application-level menu, choose Query, then Refine Query.
- Use the appropriate keyboard shortcut.

4. Add and edit the criteria.

5. Do one of the following:

   ■ In the list or form, click the Cogwheel icon, and then click Run Query.

   ■ From the application-level menu, choose Query, then Run Query.

   ■ Use the appropriate keyboard shortcut.

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

Deleting Queries

You can delete user-defined queries.

To delete a query

1. Navigate to the screen.

2. From the application-level menu, choose Query, then Delete Saved Query.

   The Delete Record dialog box appears, showing the user-defined queries for that screen.

3. Select the query you want to delete in the Query Name list.

4. Click OK to delete the query.

Canceling Long-Running Queries

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

To cancel a long-running query

1. Execute a query.

   If the query does not return records after a specified period of time, then a dialog box appears.

2. Click Cancel.

   A confirmation dialog box appears to confirm that the query canceled successfully.

3. Click OK.

Using the Query Assistant

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

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

Figure 7–1   Example of the Query Assistant Dialog Box

To perform a query using the Query Assistant

1. Navigate to the screen.

2. In the list or form, click the Magnifying Glass icon.

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

3. Click the portrait icon.

    The Query Assistant dialog box appears.

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

4. In the Query Assistant dialog box, do the following:

    a. From the field drop-down list in the first row of fields, select a field to query.

    b. From the drop-down list to the right of the field you just selected, select an operator for that field.

    c. In the field to the right of the operator you just selected, enter the value applicable to that operator.

    d. Complete other rows as needed.

    e. From the drop-down list for the Perform Query using field, select AND or OR to specify the type of operator you want to use between each row of your criteria.

        AND shows only results that meet all the criteria. OR shows results that meet any of the criteria.

    f. Click Go.

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

About Using Default Queries

When you navigate to a screen, the records that appear depend on the default query set up for that screen. You can specify a different default query in your user preferences. If no default query is set up, then the first predefined query in the drop-down list for the Saved Queries field executes. For more information, see "Setting Up Default Queries" on page 14-7.

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

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

About Querying a Telephone Number

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

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

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

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

Simple Query Operators

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

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

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

You can use simple query operators on their own.

Table 7–2 Simple Query Operators

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

Table 7–2   (Cont.) Simple Query Operators

Operator	Description	Example
<	Placed before a value, returns records containing a value less than the query value.	`<6/20/01` finds all records in which the value of the query field is earlier than 20 June 2001. When entering a date, use the format that is specific to your implementation.
>	Placed before a value, returns records containing a value greater than the query value.	`>5/31/01` finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.
<>	Placed before the value, returns records containing a value that is not equal to the query value.	`<>6/20/01` finds all records in which the date in the query field is not 20 June 2001. `<>Paris` finds all the records in which the value in the query field is not *Paris*.
<=	Placed before a value, returns records containing a value less than or equal to the query value.	`<=500` finds all the records in which the value in the query field is less than or equal to *500*.
>=	Placed before a value, returns records containing a value greater than or equal to the query value.	`>=500` finds all records in which the value in the query field is greater than or equal to *500*.
NOT LIKE, not like	Placed before a value, returns records not containing the value.	`NOT LIKE Smi*` finds all records in which the value in the query field do not start with *Smi*.
IS NULL, is null	Placed in the query field, returns records for which the query field is blank.	`IS NULL` in the Due Date query field finds all records for which the Due Date field is blank.
IS NOT NULL, is not null	Placed in the query field, returns records for which the query field is not blank.	`IS NOT NULL` in the Due Date query field finds all records for which the Due Date field is not blank.
~	Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case.	`~LIKE Smi*` finds all records in which the value in the query field starts with *Smi*, *smi*, *SMI*, and so on. Using this operator might affect performance. You can enter a CIAI query expression for a contact as follows: [Last Name] ~Like abc*

Compound Query Operators

Table 7–3 shows compound query operators. In this table, operators appear in uppercase. However, query strings are case-sensitive. The operators do not have to be in uppercase.

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

Table 7–3   Compound Query Operators

Operator	Description	Example
AND, and	Placed between values, returns only records for which all the conditions are true.	`*performance* AND *memory*` finds all records that contain both *performance* and *memory* in the query field.
OR, or	Placed between values, returns records for which at least one condition is true.	`*performance* OR *memory*` finds all records that contain either *performance* or *memory* in the query field.
		`performance* OR memory*` finds all records that start with either *performance* or *memory* in the query field.
NOT, not	Placed before a value, returns only records that do not contain the value.	`*performance* AND NOT LIKE *memory*` finds all records that contain *performance* but not *memory* in the query field.
		`NOT (performance OR memory)` finds all records that contain neither *performance* nor *memory* in the query field.
()	Placed before and after the values and operators that are processed first, regardless of the default processing order.	`(sun OR moon) AND NOT stars` returns records that contain *sun* or *moon*, but not *stars*, in the query field.
LIKE, like	Placed before a value, returns records containing the value.	`(performance* OR memory*) AND LIKE (problem)` finds all records in which the query field starts with *performance* or *memory* and also includes *problem*.
		The LIKE operator is case sensitive. To find matches regardless of case, see Table 7–2, " Simple Query Operators".

Tips for Queries

Note the following tips when you create and execute queries:

- The Siebel application automatically adds a wildcard to the end of your query. If you search for Siebe, then all words beginning with the letters Siebe are found.

- When you create a query, the records matching the query criteria appear in a list. While you work with the records in the list and move through the views within the current screen, the list continues to show the records that were found when you executed the query. The list is reset to the default list of records when you leave and then again access the current screen.

- If you no longer need the list of records in a query and want to reset the list, then click navigate to the current screen again to return to the default set of records.

- If a predefined query created by your organization appears in the drop-down list for the Saved Queries field, then you cannot delete this query from the list.

However, you can modify the query criteria and save the query using another name. For more information, see "Refining Queries" on page 7-4.

- You cannot query on Notes views when you are connected to the server.

- Any queries that execute in Administration screens against multi-value group fields are automatically appended by EXISTS(). Consequently, you can see every record, regardless of whether it is a primary record.

- When you create a query and navigate through the views, use the hyperlinks on the link bar to return to the queried list of records.

- If you execute a query that includes more than one consecutive blank space, and if you do not place quotes around the query, then the spaces are ignored, and you see inaccurate results.

- When the query results appear in list format, the first record is highlighted. It might appear as though the record you select before running the query appears again, but you are actually seeing a new set of records resulting from your query.

- In query mode, check boxes have three states: checked, unchecked, and intermediate. If you specify intermediate in a check box field when running a query, then your Siebel Business application returns records that are checked and records that are unchecked.

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

Related Topics

- "Querying for Records in a Selection Dialog Box" on page 5-5
- "Setting Up Default Queries" on page 14-7
- "Displaying Record Count" on page 6-9

8

Using iHelp

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

- About iHelp
- Using iHelp to Complete Tasks
- Using the iHelp Map

About iHelp

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

Figure 8–1 shows an example of the iHelp pane for the Accounts screen.

Figure 8–1   Example of an Expanded iHelp Item
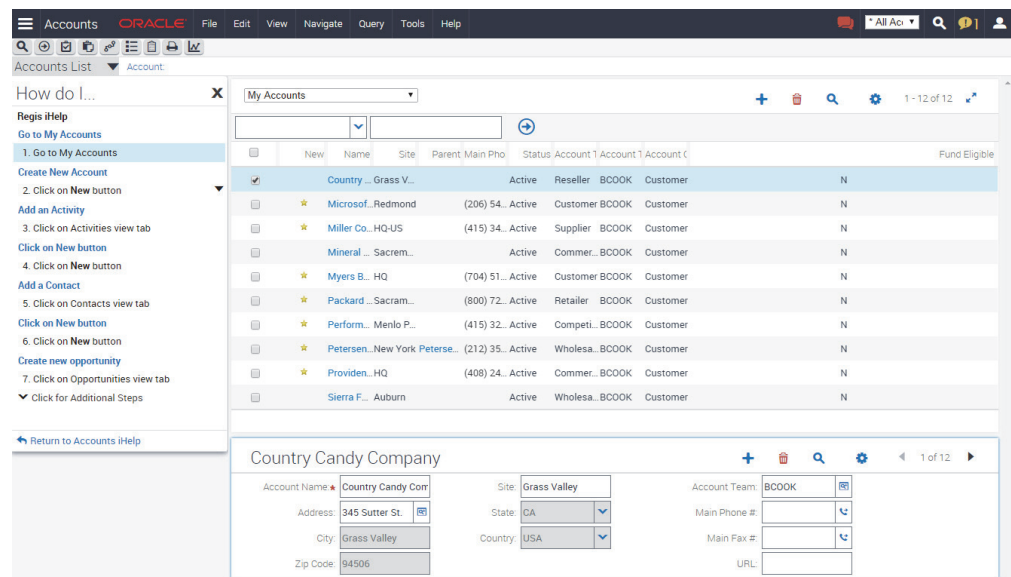
After you launch an iHelp item, it remains active until you end it. If you launch iHelp, and navigate to a different screen, then the iHelp steps do not change. If iHelp is not

running a task, and you navigate to a screen, then you see iHelp items related to that screen.

Using iHelp to Complete Tasks

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

To use iHelp

1. Navigate to the screen.

2. Do one of the following:

   ■ From the application-level menu, choose View, Action Pane, and then iHelp.

   ■ Click the How Do I button on the application toolbar.

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

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

4. Follow the instructions provided in the iHelp pane.

   Some additional information is provided in the following table.

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

5. To close the iHelp pane, click the Close (X) icon in the upper right corner of the page.

Using the iHelp Map

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

To use the iHelp Map

1. Do one of the following:

   ■ Choose Navigate, then Go to iHelp Map.

■   Choose Navigate, then Site Map, then iHelp Map, and then iHelp Map.

The iHelp Map screen appears.

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

9

Using Task UI

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

- About Task User Interface
- Using Task UI
- Navigational Buttons for Task UI

About Task User Interface

Task UI is a wizard-like user interface that:

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

Task UI features help increase the efficiency of:

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

Task UI includes the following features that support task execution:

- **Tasks Pane.** The left side of the screen contains a listing of the tasks available to you. These tasks relate to the current context. When you select a given task, the Tasks Pane shows the sequence of steps for that task.

- **Navigation Buttons.** The Task screen has a standard set of four buttons that control navigation through the task flow. It includes buttons to move forward and back through the task steps and provides the ability to pause a task for later resumption and to cancel a task. For more information about the navigational buttons, see "Navigational Buttons for Task UI" on page 9-2.

- **Radio Buttons.** Radio buttons provide support for decision-making within a task. The choices within a task determine the branches and screens that you can access.

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

Using Task UI

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

To use Task UI

1. Click the Tasks button on the application toolbar.

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

2. In the Tasks pane, drill down on a task item to launch the Task UI wizard.

3. Select one of the radio buttons to choose an option, and click Next.

4. Follow the instructions in the wizard.

5. After you complete the task, close the Tasks pane.

Navigational Buttons for Task UI

Table 9–1 shows the navigational buttons for the Task UI wizard. Many of these buttons can appear at the bottom of the Task UI wizard. Your Siebel application might contain additional buttons.

Navigation happens on the first click in the Task UI wizard. As a visual cue, the step or chapter name in the task pane is hyperlinked.

Table 9–1   Navigational Buttons in Task Wizard

Button	Description
Previous	Navigates to the previous step in the task. This button is disabled for the first step. This button might also be disabled for the steps that follow the step in which data is committed to the database.
Next	Navigates to the next step in the task. This button also validates your actions and prevents you from proceeding to the next step until the required criteria are met. This button is relabeled *Finish* when you reach the final step of the task.
Pause	Saves the task in its current stage and sends the task to your Inbox. You can launch the task later and resume the task from where you left off. You can set this option from your user preferences. For more information, see "Setting Confirmation Before Deleting Records Prompt" on page 14-5.
Cancel	Deletes the task without saving any data, but if a task is previously saved, then restores the task to its previous state. The Pause and Cancel buttons are enabled for all steps. However, when the data is already committed, the Cancel button is disabled for the last step.
Submit	Writes data while in the middle of a task. Some data is posted to the database rather than queued until the end of the task.

10

Synchronizing Data

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

- About Database Synchronization
- Synchronization Process
- About Synchronizing with a Personal Information Manager Server

About Database Synchronization

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

The copy of the database on your laptop is generally called a local database. The Siebel application is the interface that allows you to add and manipulate information in the database. Using a dial-up connection, you synchronize your local database with the server database by sending data to the server and receiving data from the server. Figure 10–1, "Synchronization Process" shows the synchronization process.

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

You synchronize data regularly for the following reasons:

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

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

Synchronization Process

Figure 10–1 shows the synchronization process.

Figure 10–1   Synchronization Process
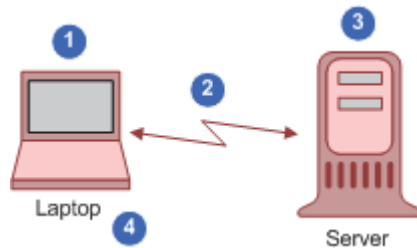
The synchronization process includes the following steps:

1. You make offline changes to the database on your laptop.

2. You dial in and synchronize data.

   You initiate the synchronization process by choosing File, then Synchronize Database from the application-level menu.

3. The server accepts all the changes to the server database and any new or changed data from your laptop.

4. You see all the changes to your laptop database and any new or changed data from the server.

About Synchronizing with a Personal Information Manager Server

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

11

Sharing Information

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

- Using the Inbox
- Running Reports
- Emailing, Faxing, Paging, and Sending Outbound Wireless Messages
- Creating Siebel Bookmarks
- Importing Data into the Siebel Application
- Exporting Data to an External File

Using the Inbox

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

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

To use your Inbox

1. From the application-level menu, choose Navigate, then Site Map.

2. Click Inbox.

   The Site Map displays the views available for the Inbox.

3. Click Inbox Items List.

4. In many cases, you can drill down on the Name field hyperlink to see details about the work item.

Running Reports

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

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

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

To run a report

1. Navigate to the screen and view that contains the information for which you want to run a report.

2. (Optional) Limit report data by running a query.

3. On the application toolbar, click the Reports button.

    The Run Report pane appears.

4. In the Run Report pane, complete the appropriate fields.

    Some fields are described in the following table.

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

5. Click Submit.

    The designated report runs.

6. Click My Reports to navigate to the Reports view of the BI Publisher Reports screen.

    A record for the run report appears in the Reports view.

7. Drill down on the Report Name field in the Reports view to display the report in a new window.

    You can print the report by using the print feature for the application in which it appears.

Emailing, Faxing, Paging, and Sending Outbound Wireless Messages

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

- **Send Email.** Allows you to send email directly from the Siebel application. For more information, see "Setting Outbound Communications Preferences for Send Email" on page 14-6.

- **Send Fax.** Allows you to send a fax directly from the Siebel application.

- **Send Page.** Allows you to page someone directly from the Siebel application.

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

Alternatively, you can send messages by clicking the send icon on the menu toolbar. For more information, see "About Sending Messages" on page 3-12.

Sending a fax, page, or an outbound wireless message is similar to sending an email. If you cannot send a fax, page, or outbound wireless message, then contact your Siebel administrator.

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

Sending Email from the Siebel Application

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

Figure 11–1 shows an example of the Send Email dialog box.

Figure 11–1   Example of the Send Email Dialog Box

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

To send an email from the Siebel application

1. Navigate to the screen.

2. Select the record for which you want to send the email.

    On some screens, data associated with the selected record might be inserted into the email.

3. From the application-level menu, choose File, then Send Email.

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

    The Send Email dialog box appears.

4. Complete the appropriate fields in the dialog box.

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

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

5. (Optional) Complete the following additional steps:

    a. Attach literature and other files to the email by clicking the open book icon or the paperclip icon next to the Attachments field.

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

    b. If you select HTML as your Default Message Format user preference, then edit aspects of the message text, such as font size, font color, paragraph justification, and so on. For more information, see "Using the HTML Editor" on page 11-4.

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

6. Click Send to send the email.

Using the HTML Editor

You can set your user preferences to allow you to use the HTML editor in the Send Email dialog box. For more information, see "Setting Outbound Communications Preferences for Send Email" on page 14-6.

In the Siebel application, you might come across various screens in which you can invoke the HTML editor. The HTML editor provides special editing controls that allow you to use supported HTML formatting, and also provides some standard editing features, such as cut and paste.

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

About Outlook (F9) Integration

F9 integration is supported by the Siebel Email client due to integration limitations between client-side desktop applications and Web browser security models. Using the integrated email client within Siebel has many benefits. For example, the internal email client is able to capture customer responses, not just outbound emails in the customer profile. All communications are captured, not just the outbound communications.

Creating Siebel Bookmarks

A Siebel bookmark is a URL that links to a specific record in the Siebel application. A Siebel bookmark included in an email message or a document allows a user to click a link to navigate directly to a record if the Siebel application is active on the user's computer. If not logged in to Siebel, a user must authenticate to the application to gain access to the record.

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

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

To add a Siebel bookmark to an email or a document

1. Navigate to and select the Siebel record to which you want to create a link.

2. To create a bookmark from the URL in the browser, select the URL in the address field of the browser, and then copy and paste this URL to an email or document.

Importing Data into the Siebel Application

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

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

To import data into the Siebel application

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

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

---

2. Click the Cogwheel icon, and then click Import.

   The Import dialog box appears.

3. In the Import dialog box, do the following:

   a. Click Browse for the Input File field to select the file to import.

   A dialog box appears.

b. Select the file you want to import, and click Open.

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

> **Note:** The file you import must be consistent with the format you select for the Input Format option.

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

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

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

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

f. Click Next.

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

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

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

5. Click Next.

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

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

Exporting Data to an External File

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

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

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

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

To export data to an external file

1. Navigate to the screen from which you want to export data, and run a query to display the records.

2. (Optional) Use the Columns Displayed function to add columns to and remove columns from the list.

   For more information, see "Organizing List Columns" on page 6-15.

3. Click the Cogwheel icon, and then click Export.

   The Export dialog box appears.

4. In the Export dialog box, do the following:

   a. Use the Rows To Export option buttons and Columns To Export option buttons to define the rows and columns you want to export.

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

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

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

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

   c. Click Next.

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

5. In the dialog box for opening the exported file, select the appropriate option, and click OK.

   If the dialog box does not appear, then you can access the exported file in your directory of exported files.

6. Click Close in the Export dialog box.

12

Using the Calendar

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

- About the Calendar
- About Calendar Formats
- About Calendar Views
- About Viewing Activities
- About Activity Defaults
- About Recurring Activity Defaults
- About Using the Participant Availability Subview
- About Using Group Calendars
- About Viewing Calendar Availability
- About Using Alarms for Activities
- Viewing Calendar Activities
- Adding Activities to the Calendar
- Deleting Calendar Activities
- Creating Recurring Calendar Activities
- Deleting Recurring Calendar Activities
- Adding Activities in the To Do List
- Marking To Do Activities Complete
- Changing Activities
- Rescheduling Activities
- Adding Participants to Activities
- Removing Participants from Activities
- Reassigning Activities
- Granting Access to Your Calendar
- Activating Alarms
- Postponing and Dismissing Alarms

About the Calendar

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

Note the following about using calendar:

- An explicit click is required to make a date selection in the calendar.

- The current date is not assumed as the default date.

- Calendar does not show a time zone drop down list for Sales Orders.

- A 7 day view is not available for calendar.

Figure 12–1 shows an example of the Calendar screen.

Figure 12–1   Example of the Calendar Screen
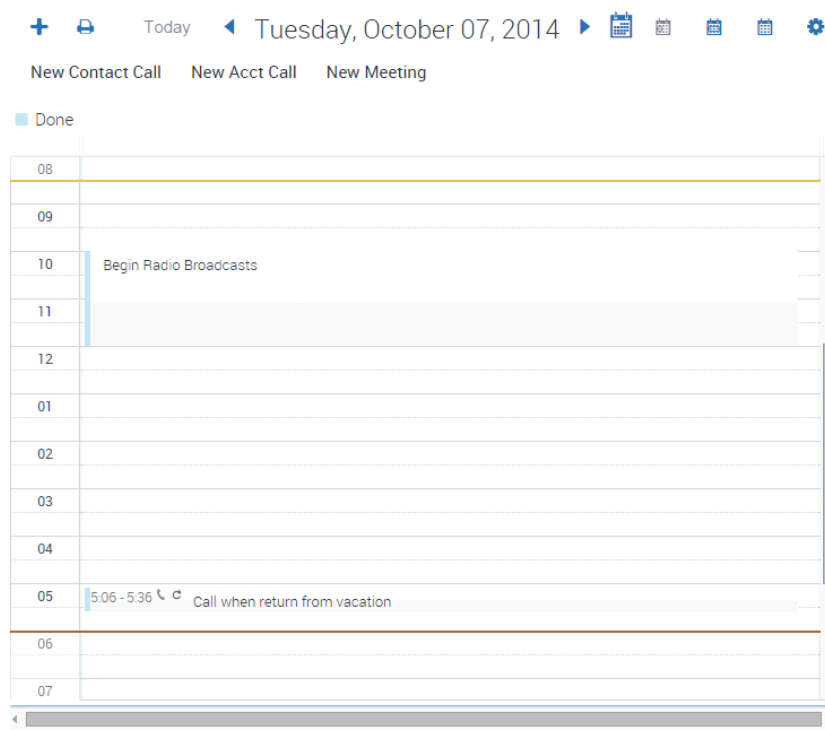
Each activity that appears in the calendar is highlighted in the color associated with the Status field value of that activity. The color legend for the calendar shows only those colors that appear in the displayed calendar, not all possible colors. The Siebel administrator can change the colors for Status field values and change the field that determines activity color from the Status field to another field, such as the Type field. For more information about customizing these colors and fields, see *Configuring Siebel Open UI*.

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

Your working hours for the current date and future dates are denoted by a yellow line that represents the beginning of your workday (or the current time), and a red line that represents the end of your workday. You can change the start time and the end time of your workday. For more information about changing your workday start and end times, see "Setting the Length of a Workday" on page 14-12.

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

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

About Calendar Formats

The configuration of your Siebel application determines the availability of certain features. Therefore, the calendar formats you see can differ from the calendar formats described in this topic. Calendar format buttons appear in the Calendar screen. Table 12–1 describes the calendar format buttons.

Table 12–1   Calendar Format Buttons

Button	Name	Description
	Switch to daily view button	Displays your activities that are scheduled for the selected day.
	Switch to week view button	Displays your activities that are scheduled for the selected week. You can designate a 5 Day Weekly format or a 7 Day Weekly format in your user preferences. For more information, see "Setting Up Default Calendar Formats" on page 14-14.
	Switch to month view button	Displays your activities that are scheduled for the selected month.

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

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

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

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

- Click the Today link to navigate to the current date when the current date does not appear in the displayed calendar format.

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

When you click the calendar select button, you access the calendar control. Unlike the calendar control for fields, the calendar control for the Calendar screen does not include an OK button and a Now button that you can click to select a date. In the calendar control for the Calendar screen, you click a date to select the date. For more information about the calendar control, see "About the Calendar Control" on page 4-5.

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

About Calendar Views

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

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

You can navigate to a date in Calendar views in the same way that you navigate to a date in Calendar screens. For more information about this date navigation, see "About Calendar Formats" on page 12-3.

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

About Viewing Activities

Activities can appear in the Activities screen, in the Calendar, and in the To Do list. The place where an activity appears depends on the place where you create it. Table 12–2 explains where activities appear.

> **Note:** You cannot query for activities in the calendar.

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

Table 12–2   Where Activities Appear

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

Table 12–2 (Cont.) Where Activities Appear

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

About Activity Defaults

When you create a new calendar activity, some fields are populated with default values. Table 12–3 shows these values as they appear in the preconfigured Siebel application.

Table 12–3 Default Values for Calendar Activity Fields

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

About Recurring Activity Defaults

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

Table 12–4 shows the default values for the End By field. For more information about creating recurring activities, see "Creating Recurring Calendar Activities" on page 12-10.

Table 12–4 Default Values for End By Field

If Repeat Type value is...	Then the default End By value is...
Daily	Today plus 7 days
Weekly	Today plus 90 days

Table 12–4   (Cont.) Default Values for End By Field

If Repeat Type value is...	Then the default End By value is...
Monthly	Today
Yearly	Today

About Using the Participant Availability Subview

The Participant Availability subview (shown in Figure 12–2) that appears below the Calendar Detail form can provide you more information about an activity and its participants.

Figure 12–2   Example of Participant Availability Subview

The following information can help you to use this subview:

■   Click Add Employee, Add Contact, or Add Resource to add new participants to an activity.

■   Contacts that appear in this subview have no associated schedules.

■   Click the participant name in the Participants column, and click the Trash Can icon to remove an existing participant from an activity.

■   All the schedules you see in the Participant Availability subview are converted to the time zone specified in your time zone preferences. For example, if your calendar displays Pacific time, and you are viewing an activity involving a user in the Eastern time zone, then the Eastern time zone user's schedule is converted to Pacific time for you. If the Eastern time zone user is looking at the same activity in the calendar, then the schedule is converted to Eastern time.

■   Navigating to a date in the Participant Availability subview is similar to navigating to a date in the calendar. For more information about calendar navigation, see "About Calendar Formats" on page 12-3.

Double left arrows and double right arrows are available to navigate to one week back or one week forward.

■   You can advance the schedule to a future date by using the horizontal scroll bar at the bottom of the schedule. If you want to see more than three days after the

activity's current date, then you must reset the start date in the Calendar Detail form.

- Click the hour increment buttons (1/4, 1/2, and 1) to change the time increments that appear in the schedule.

- You can choose to display only your work hours or all 24 hours of the day. For more information, see "Setting Up Default Display for Participant Schedule" on page 14-15.

- Scheduled activities appear as blocks on the calendar. The blocks are highlighted in the color associated with the Status field of the activity. The color legend shows only those colors that appear in the schedule, not all possible colors.

- The start time of the current activity is denoted with a red line, and the end time of the current activity is denoted with a green line.

- Any changes you make in the Calendar Detail form are automatically reflected in the Participant Availability subview.

About Using Group Calendars

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

About Viewing Calendar Availability

When trying to find a time to schedule a meeting, you might want to consult a detailing of how many available hours a user has on a particular day. If calendar availability is enabled, then when you open a monthly view of the calendar, it shows the available hours for every day in the future. The available hours are represented by a rounded number surrounded by a circle. These hours are calculated by taking the number working hours defined by the user, and subtracting the time for any events already scheduled for that day. Figure 12–3 shows an example of calendar availability.

Figure 12–3   Example of Calendar Availability
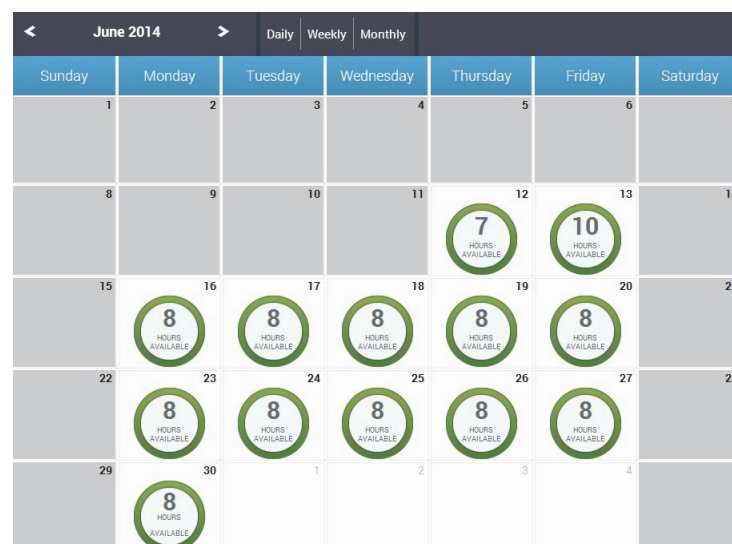
Calendar availability is available only if administrators configure Siebel Open UI to allow it. For more information about this configuration, see *Configuring Siebel Open UI*.

Viewing Calendar Activities

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

> **Note:** You cannot query for activities in the calendar.

To view calendar activities

1. Navigate to the Calendar screen.

   The calendar appears, showing the daily calendar format.

2. (Optional) Click a button to change the calendar format.

   For more information, see "About Calendar Formats" on page 12-3.

3. Place your cursor over the hyperlink for an activity description to view details about that activity.

About Using Alarms for Activities

Alarms can notify you of the start time for a pending activity. The Alarm check box in each activity record activates this notification. For alarm notification, a dialog box appears in the application window at a predetermined time before the start of an activity. You can postpone the alarm so that it appears again at a specified time. For more information about postponing alarms, see "Postponing and Dismissing Alarms" on page 12-19.

For a recurring activity, the alarm appears at the specified time before the start of each instance of the activity. You can specify the time at which an alarm triggers for each activity when you create the activity. You can also specify a default alarm time for all activities. For more information, see "Setting Up Default Alarm Lead Times" on page 14-13.

Alarms trigger and appear only if you are logged in to the Siebel application at the time of the alarm. If you log in after an alarm is scheduled to trigger, then it triggers when you log in. Also, an alarm does not appear if the Siebel application is not the active application on your desktop when the alarm is due. Instead, you hear the alarm chime and you see a flashing button in your task bar. You can click the flashing button in the task bar to view the alarm.

Depending on the configuration of your Siebel application, you might not have access to alarm functionality. For more information, contact your Siebel administrator.

Adding Activities to the Calendar

You can add activities to any time slot in the calendar. You can designate the time for your work hours in your user preferences. For more information, see "Setting the Length of a Workday" on page 14-12.

To add an activity to the calendar

1. Navigate to the Calendar screen.

2. (Optional) Navigate to a date in the calendar.

    If you complete this step, then the value in the Start field of the Calendar Detail form includes the date to which you navigate. The Calendar Detail form appears when you complete the next step. For information about navigating to a date in the calendar, see "About Calendar Formats" on page 12-3.

3. In the daily, weekly, or monthly calendar format, click plus (+) icon.

    The Calendar Detail form appears.

4. Complete the fields.

5. Click Save This One.

    The activity appears in your calendar and in the Activities screen.

Entering Activities Directly in the Calendar

In the daily and weekly calendar format, you can enter an activity directly in the calendar.

To enter an activity directly in the calendar

1. Navigate to the Calendar screen.

2. In the daily or weekly calendar format, click the time slot for which you want to create the activity.

    If you want to create an activity that spans multiple time slots, then click the first time slot, and without lifting the mouse button, drag and drop the activity to the last time slot.

3. In the New Event dialog box, enter a description, and click OK.

    The activity appears in your calendar and in the Activities screen.

Deleting Calendar Activities

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

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

■   Activities that you do not own in your calendar.

■   Activities that you can only view in the calendars of other users.

■   Activities that are protected by industry-specific functionality.

    For example, some call records in Siebel Life Sciences are read-only. You can delete the call record, but not the calendar activity for the call record.

To delete an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

    The Calendar Detail form appears.

3. Click Delete This One.

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

Creating Recurring Calendar Activities

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

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

To create a recurring calendar activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the plus (+) icon.

The Calendar Detail form appears.

3. Complete the fields.

Some fields are described in the following table.

Field	Description
Alarm	(Optional) Select this check box to activate an alarm for the activity.
	A user preference automatically activates the alarm each time you create an activity. For more information, see "Activating Alarms for All Calendar Activities" on page 14-13.
Repeat Type	Select a value to designate how often you want this activity to recur. For more information about the Repeat Type value, see Table 12–4.
	Select the appropriate option for the value that you select in the Repeat Type field.
End By	(Optional) Select the date on which you want the activity to stop recurring by selecting this option and clicking the Calendar button in the field.

4. Click Save This One.

Changing Recurring Activities to Nonrecurring Activities

You can change a recurring activity to a nonrecurring activity.

To change a recurring activity to a nonrecurring activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

The Calendar Detail form appears.

3. From the drop-down list for the Repeat Type field, choose Non-Repeating.

4. Click Save All.

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

Deleting Recurring Calendar Activities

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

Deleting One Instance of a Recurring Activity

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

To delete one instance of a recurring activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.

3. Click Delete This One.

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

Deleting Every Instance of a Recurring Activity

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

To delete every instance of a recurring activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.

3. Click Delete All.

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

Adding Activities in the To Do List

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

To Do activities have the following characteristics:

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

■ They carry forward every day until they are marked complete.

■ They do not appear in the Calendar itself.

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

To add a To Do activity

1. Navigate to the Calendar screen.

2. In the To Do list, click the plus (+) icon.

    A blank row appears in the list.

3. Enter values in the Description and Due fields.

4. (Optional) To add more information to the activity, drill down on the Description field hyperlink of the activity.

Marking To Do Activities Complete

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

To mark a To Do activity as complete

1. Navigate to the Calendar screen.

2. In the To Do list, select the To Do activity you want to mark as complete.

3. Select the Done check box.

Changing Activities

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

Changing Nonrecurring Activities

Complete the procedure in this topic to change nonrecurring activities.

> **Note:** Each time you create or modify an activity in the calendar, you can choose to automatically notify any employees who are associated with the activity. For more information, see "Setting Up Email Prompts for Meetings" on page 14-14.

To change a nonrecurring activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

    The Calendar Detail form appears.

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

Changing Recurring Activities

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

To change a recurring activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.

3. Make the necessary changes, and click one of the following buttons:

   ■ **Save This One.** Saves the changes you make to the current recurring activity, changes the activity to a non-recurring activity, and does not change every other recurring activity in the series.

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

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

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

Rescheduling Activities

You can use different methods to reschedule activities.

Rescheduling Activities by Changing Date Fields

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

To reschedule an activity by changing date fields

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.

3. Change the value in the Start field.

4. Change the value in the End field.

Rescheduling Activities by Using Drag-and-Drop

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

To reschedule an activity by using drag-and-drop

1. Navigate to the Calendar screen.

2. In the daily or weekly calendar format, click the time slot for the activity in the calendar, and without lifting the mouse button, drag and drop the activity to a different time slot in the calendar.

Rescheduling Activities by Stretching Activity Borders

In the daily and weekly calendar format, you can stretch the cell borders for an activity to reschedule the activity.

To reschedule an activity by stretching the activity borders

1. Navigate to the Calendar screen.

2. To change a start time for the activity, do the following:

   a. Place the cursor over the top border of the activity.

      A line with arrowheads appears.

   b. Click and drag activity's top border to an earlier or later time.

3. To change an end time for the activity, do the following:

   a. Place the cursor over the bottom border of the activity.

      A line with arrowheads appears.

   b. Click and drag activity's bottom border to an earlier or later time.

Adding Participants to Activities

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

Participants can also include resources, such as a projector or a conference room. For more information, see "About Using the Participant Availability Subview" on page 12-6.

Adding Contacts to Activities

You can add contacts to activities.

To add contacts to an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participant Availability subview beneath it.

3. In the Participant Availability subview, click Add Contact.

   The Add Contacts dialog box appears.

4. Select one or more contact records.

5. After you select the contacts you want to add, click OK.

   The selected contacts appear in the Participant Availability subview and are part of the activity.

Adding Employees to Activities

You can add employees to an activity.

To add employees to an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participant Availability subview beneath it.

3. In the Participant Availability subview, click Add Employee.

   The Add Employees dialog box appears. If a large number of employees appears, then you can use the Magnifying Glass icon in the Employees list to find an employee.

4. Select one or more employee records.

5. After you select the employees you want to add, click OK.

   The selected employees appear in the Participant Availability subview and are part of the activity.

6. (Optional) Review the Participant Availability subview to verify an employee's availability.

Adding Resources to Activities

You can add resources to an activity.

To add resources to an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participant Availability subview beneath it.

3. In the Participant Availability subview, click Add Resource.

   The Pick Resource dialog box appears.

4. Query for the type of resource you are looking for.

5. Select one or more records, and click Check Availability.

   Only the resources that you select in Step 4 appear. A check mark appears in the Availability column for any resource that is available during the time of the activity.

6. Select the available or unavailable resources that you want to add to the activity, and then click OK.

   The resources appear in the Participant Availability subview.

Removing Participants from Activities

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

Removing Contacts from Activities

You can remove contacts from activities.

To remove contacts from an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

    The Calendar Detail form appears with the Participant Availability subview beneath it.

3. To remove a single contact, do the following:

    a. Click the contact name in the Participants column of the Participant Availability subview to select the contact.

    b. Click the Trash Can icon.

4. To remove multiple contacts, do the following:

    a. In the Contacts field of the Calendar Detail form, click the select button.

        The Contacts multiple selection dialog box appears showing the list of selected contacts for the activity.

    b. Select the contacts that you want to remove from the activity, and click the left arrow button.

        The removed contacts no longer appear in the list of selected contacts.

    c. Click OK.

Removing Employees from Activities

You can remove employees from activities.

To remove employees from an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

    The Calendar Detail form appears with the Participant Availability subview beneath it.

3. To remove a single employee, do the following:

    a. Click the employee name in the Participants column of the Participant Availability subview to select the employee.

    b. Click the Trash Can icon.

4. To remove multiple employees, do the following:

    a. In the Employees field of the Calendar Detail form, click the select button.

        The Employees multiple selection dialog box appears showing the list of selected employees for the activity.

    b. Select the employees that you want to remove from the activity, and click the left arrow button.

       The removed employees no longer appear in the list of selected employees.

    c. Click OK.

Removing Resources from Activities

You can remove resources from activities.

To remove resources from an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participant Availability subview beneath it.

3. To remove a resource, do the following:

   a. Click the resource name in the Participants column of the Participant Availability subview to select the resource.

   b. Click the Trash Can icon.

Reassigning Activities

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

To reassign an activity

1. Navigate to the Calendar screen.

2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.

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

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

   You must change the primary employee to reassign the activity.

4. If the employee to whom you want to assign the activity does not appear in the list of selected employees, then select the employee in the list of available employees, and click the right arrow to add the employee to the list of selected employees.

5. When the employee to whom you want to assign the activity appears in the list of selected employees, do the following:

   a. Click the Primary field in the record for this employee, and click OK.

   The activity is reassigned.

   b. If the previous primary employee is no longer involved with the activity, then access the Employees multiple selection dialog box again, select the employee in the list of selected employees, and click the left arrow to remove the employee from the list of selected employees.

Granting Access to Your Calendar

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

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

To give others access to your calendar

1. Navigate to the Calendar screen, then the Access List view.

   The Calendar Access list appears.

2. Click the plus (+) icon.

   The Add Employees dialog box appears.

3. Select the record for an employee, and then click OK.

   The employee you select appears in the Calendar Access list, and that employee can now view your calendar.

4. (Optional) To allow the employee to add activities to your calendar, select the Allow Updates check box.

Activating Alarms

To activate (or set up) an alarm for an activity, select the Alarm check box in an activity record on any screen that provides an Activities view or in the Calendar screen.

Alarms work correctly only if your computer's time zone setting is the same as the time zone set up in your user preferences. For more information about setting the time zone in your user preferences, see "Setting a Default Time Zone" on page 14-2.

To activate an alarm for a calendar activity

1. Navigate to the Calendar screen.

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

   The Calendar Detail form appears.

3. Select the Alarm check box.

   The Alarm Lead field is automatically populated with the default lead time set up in your user preferences. For more information, see "Setting Up Default Alarm Lead Times" on page 14-13.

4. To change the lead time, select a value from the drop-down list for the Alarm Lead field.

5. Click Save This One.

   An alarm icon appears next to the hyperlink for the description of the activity in the calendar.

> **Note:** You might want alarms to trigger for every calendar activity you create. You can perform this setup in your user preferences. For more information, see "Activating Alarms for All Calendar Activities" on page 14-13.

Postponing and Dismissing Alarms

When an alarm appears on your screen, you can postpone or dismiss it. When you postpone it, you can specify the length of time for the alarm snooze. In your user preferences, you can set a default for the alarm snooze time in all of the activities you create. For more information, see "Setting Up Default Alarm Snooze Times" on page 14-14.

Postponing Alarms

You can postpone an alarm in the Alarm dialog box.

To postpone an alarm

1. In the Alarm dialog box, choose the length of time for which you want to postpone the alarm from the drop-down list for the Snooze For field.

2. Click Snooze to postpone the alarm.

   The alarm appears again after the amount of time you specify passes.

Dismissing Alarms

You can dismiss an alarm in the Alarm dialog box.

To dismiss an alarm

■ In the Alarm dialog box, click Dismiss to close the alarm.

   The alarm does not appear again for the activity.

> **Note:** If multiple alarms appear before you either postpone or dismiss them, then they are all queued behind the same alarm dialog box. You can click the Previous and Next buttons to move to each alarm. You can also click Dismiss All to dismiss every alarm that is currently active, or you can click Snooze All to postpone every alarm that is currently active.

13

Using Notifications

This chapter explains the procedures necessary to use, administer, and review notifications for Siebel Business Applications. It includes the following topics:

- About Notifications
- Scenario for Administering Notifications
- Process of Administering Notifications
- Enabling and Disabling Notifications
- Enabling or Disabling Notifications in Siebel Mobile and Developer Web Clients
- Creating a Notification
- Updating a Notification
- About Automatically Updating Notification Text
- Configuring Notifications Caching
- Reviewing Notifications

About Notifications

Notifications provides a way for administrators and other users to send important information directly to the screens of users. Typically, this information is time-critical, such as a due date, or it is updated frequently, such as the status of a call queue.

> **Note:** Notifications are available for employee applications, and not for customer or partner applications.

Messages appear in notification panes that users access by clicking the Notification icon. They have severity levels (indicated by color) and activation and expiration dates.

You create notifications in the Message Broadcasts view of the Administration - Communications screen. Notifications can be created automatically from Siebel Business Process Designer or remotely from a third-party application through Siebel EAI.

About Notification Message Order

Notification messages are retrieved from the Message table through the Siebel Application Server and sent to the notification pane of the targeted Siebel Web Client sessions.

Messages in the Notification Summary pane appear in a set order. Unread messages appear at the top of the pane and are sorted by message date with later messages listed before earlier messages. Read messages appear below the unread messages and are also sorted by message data with later messages listed before earlier messages.

About Disabling Notification Messages

When the administrator sets a component parameter that allows users to enable or disable notification messages, users can disable the Notification icon and notification panes. The administrator can change this component parameter to override this user setting for notification messages.

About Notification Caching Versus Directly Polling the Siebel Database

The Siebel application obtains the display messages by using the following methods:

- The default behavior is read the messages from the Siebel database each time the notification pane is refreshed. This method can adversely affect performance if the panes are set to refresh frequently.

- Notification caching stores messages in each Siebel Application Object Manager. The messages are then sent through the Service Request Broker (SRBroker).

Scenario for Administering Notifications

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

The contact center administrator wants to inform customer-care representatives of the current total number of outbound calls relative to their day's goal. In addition, the administrator wants the inform customer-care representatives of the current customer service levels and whether customers are waiting for service.

After working with the telecommunications and application teams to define the appropriate real-time contact center statistics for his customer-care representatives and contact center, the contact center administrator creates notifications, using statistics from a variety of sources and third party solutions. The real-time data feed into the notifications tables is accomplished through Siebel EAI after the appropriate statistics and their sources are identified. The customer-care representatives then receive their individual and group statistics on their notification pane in real time.

In addition to providing his customer-care representatives with this real-time status information, the contact center administrator also wants to send informative messages to individuals and teams in real time. Throughout the shifts and work day, he sends these messages to individuals and teams using the Message Broadcasts view within the Siebel application. The contact center administrator can send a message to an individual employee, a set of employees with the same responsibility, a division of employees, or to all employees.

The customer-care representatives service customers using multiple communication channels with the Siebel application. The customer-care representative receives contact center statistics calculated for an individual, a group, or in summary on the notification pane within the Siebel application. This real-time information updates the customer-care representatives about whether they and the call center are meeting their service objectives.

Process of Administering Notifications

To administer notifications, perform the following tasks:

1. "Enabling and Disabling Notifications" on page 13-3

2. (Optional) "Enabling or Disabling Notifications in Siebel Mobile and Developer Web Clients" on page 13-4

3. "Creating a Notification" on page 13-4

4. "Updating a Notification" on page 13-6

5. "About Automatically Updating Notification Text" on page 13-7

6. "Configuring Notifications Caching" on page 13-8

Enabling and Disabling Notifications

By default, notifications are enabled. As an administrator, you can enable or disable notifications. You can set notifications to operate in any of the following modes:

- Always enabled

- Always disabled

- User enabled (default)

This task is a step in "Process of Administering Notifications" on page 13-3.

To enable or disable notifications for a Siebel application

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

2. From the Enterprise Servers list, select the enterprise server that runs the Siebel application with the notification settings you want to modify.

3. Navigate to the Component Definitions view, and select a component with a Component Type value of Application Object Manager.

4. In the Component Parameters list, select the Application Message Bar Flag parameter, and type the appropriate value in the Value field.

   For details on how to configure the server component, or Siebel Application Object Manager, parameters, see <Emphasis>Siebel System Administration Guide.

   The parameter values are described in the following table.

Parameter Value	Comments
TRUE	Specify this value if you want to always enable notifications. For a value of TRUE, users cannot disable notifications.
	For a Siebel Web Client deployment, the Siebel Application Server relays messages to users. For Mobile Web Client users, messages are synchronized.
	For a value of TRUE, you can use the Application Message Bar Update parameter to specify the refresh rate for the notification pane. Modify the Value field of the Application Message Bar Update parameter. The default value is 120 seconds.
	If the update interval is less than the SessionTimeout set in the CFG file of the Siebel application, then sessions never time out.

Parameter Value	Comments
FALSE	Specify this value if you want to always disable notifications. For a value of FALSE, the Notification icon and notification panes do not appear on the screens of users.
	For a Siebel Web Client deployment, the Siebel Application Server does not relay messages to users. For Mobile Web Client users, messages are not synchronized.
User Enabled	Specify this value if you want users to enable or disable notifications in their user preferences.
	If a Web client user disables notifications, then the Siebel Application Server does not relay messages to the user. If a Mobile Web Client user disables notifications, then messages are not synchronized.
	For a value of User Enabled, the update interval is a user preference. For more information about this user preference, see Siebel Fundamentals XREF.
	If the update interval is less than the SessionTimeout set in the CFG file of the Siebel application, then sessions never time out.

Enabling or Disabling Notifications in Siebel Mobile and Developer Web Clients

You can enable or disable notifications in Siebel Mobile and Developer Web Clients.

This task is an optional step in "Process of Administering Notifications" on page 13-3.

To enable or disable notifications on Siebel Mobile and Developer Web Clients

1. Open the CFG file for your Siebel application using a text editor.

2. Locate and go to the ShowMessageBar parameter in the CFG file.

    For example: ShowMessageBar=True.

3. Set the parameter value to TRUE, FALSE, or User Enabled as required.

    For a description of each parameter value, see Step 4 on page 124.

4. If you set the ShowMessageBar parameter to TRUE, then specify the refresh rate for the notification pane by adding the following line to the CFG file:

    MessageBarUpdateInterval=seconds

    Where seconds is the interval in seconds between refreshes to the notification pane. The default value is 120 seconds.

5. Save and close the CFG file.

Creating a Notification

When you create a notification, all connected users you specify receive the message immediately on the date and time you specify for message activation. Mobile users, such as field representatives, receive the activated messages when they synchronize.

> **Note:** To send a notification, you must have responsibilities that include access to the Message Broadcasts view.

This task is a step in "Process of Administering Notifications" on page 13-3.

To create a notification

1. Navigate to the Administration - Communications screen, then the Message Broadcasts view.

2. In the Message Broadcasts list, create a new record, and complete the necessary fields.

   Some fields are described in the following table.

Parameter Value	Comments
Severity	Select the severity level to indicate the importance and appearance of the message. Each severity level is associated with a color. The severity level that you select determines the color of the text in the message.
	If you select a severity of Urgent with Alert, then the user sees a blinking Notification icon, and clicks this icon to view the message
Abstract	Type a brief description of the message. When users click the Notification icon to access messages, this text appears in the Notification Summary pane.
Message	Type the text you want to include in the message. This field accepts up to 2,000 characters. This text appears in the Notification Details pane.
Recipient Position	Select the positions associated with the users to whom to send the message.
	You can use this field in combination with the Recipient Division field.
	An employee name appears in the Recipients dialog box if the employee has a defined position and is marked active for that position. If multiple employees occupy the same position, then the message is sent to all of them, although you see only the active employee on the list.
	Employees with multiple positions see messages sent to any of their positions, regardless of the position associated with their login ID.
Recipient Division	Select the divisions associated with the users to whom to send the message.
	You can use this field in combination with the Recipient Position field.
All	Select the check box to send the message to all users.
Activation Date/Time	Select the date and time at which you want to start sending the message. If the Activation field is blank, then the message is sent immediately.
	However, notifications are controlled by the application message interval and login.
	The date and time are taken from the Siebel Server (not from the computer where the client browser runs). Make sure that the date and time are set correctly on the Siebel Server.
Expiration Date/Time	Select the date and time at which you want to stop sending the message. If the Expiration field is blank, then the message is sent continually.
	The date and time are taken from the Siebel Server (not from the computer where the client browser runs). Make sure that the date and time are set correctly on the Siebel Server.

Parameter Value	Comments
Broadcast	Select the check box to display the message in the notification panes. Clear the check box to not display the message in the notification panes.
Briefing Bulletin	Select the check box to distribute the message as a bulletin on the My Briefing page. For more information, see *Siebel Briefings Administration Guide*.
Allow Dismiss	Select the check box to allow users to dismiss (or delete) the message in the Notification Summary pane. When you select this check box, a Dismiss icon appears next to the message in the Notification Summary pane, and users click this icon to dismiss a message.
Recipient Users	Select the users to whom to send the message.
	If the values that you select in the Recipient Position field and the Recipient Division field are not associated with all of the users to whom you want to send the message, then select the remaining users in this field.

Updating a Notification

Sometimes after a message is sent to users, you might want to change the message text. In this scenario, you want users who have already read or dismissed (deleted) the message to see your changed version of the message. Complete the procedure in this topic to convert a message that users have already read or dismissed to a message that users have not read or dismissed. Users can then access the message again to see the changed version of the message.

This task is a step in

To update a notification

1. Log in to the Siebel business application as administrator.

2. Navigate to the Administration - Communications screen, then the Message Broadcasts view

3. In the Message Broadcasts list, select the message you want to update.

4. Complete the appropriate changes to the message.

5. Click Set as Unread.

    After you update an existing or create a new notification message in Siebel CRM, the updated or new message is sent directly to application screens and the counter beside the Notification icon on the menu toolbar increases to indicate that a new message has arrived. If the new message waiting to be read has an Urgent with Alert severity, then the Notification icon also blinks on the menu toolbar.

Administrators can modify the code internally for notification messages on either the client or server-side using the following APIs:

- **AddNotification.** Creates a notification and returns the Row_Id of the notification.

- **DeleteNotification.** Deletes a notification using the Row_Id.

- **UpdateNotification.** Updates a notification using the Row_Id.

- **ReadNotification.** Returns the notification details using the Row_Id.

For more information about these APIs, see *Configuring Siebel Open UI*.

About Automatically Updating Notification Text

As an administrator, you can customize notifications to automatically update message text that changes frequently. For example, a call center's queue statistics frequently change. Every few minutes, an administrator has to update the statistics to make sure agents have the most accurate information. This manual approach is very time consuming and inefficient when dealing with frequently changing data.

You can use Siebel EAI to automatically update notification text. Your CTI middleware or ACD switch can provide the data for the Siebel application to distribute.

The Broadcast Message business component manages the messages. Table 13–1 lists and describes the fields of this business component. These field names are necessary for developing the integration object.

This task is a step in "Process of Administering Notifications" on page 13-3.

Table 13–1   Field Names for the Broadcast Message Business Component

Field	Description
Abstract	A short summary for identifying the purpose of a message, such as Calls In Queue.
Activation Date/Time	The beginning of the notification.
All	The designation to send the message to all employees with positions defined.
Body	The text of the message.
Division	The designation to set recipients using division.
Division Id	The internal identification value for Division.
Expiration Date/Time	The end of the notification.
Position	The designation to set recipients using position.
Position Id	The internal identification value for Position.
Recipient	The designation to set recipients using employee.
Recipient Id	The internal identification value for Recipient.
Type	The severity of the message as defined in the type BRDCST_MSG_TYPE in the List of Values.
Via Broadcasting	The designation to send the message using notifications.
Via Interactive	The designation to send the message using Siebel eBriefings.

Sample Notifications Script

The script can be created through a button, an Excel macro, or another VB application. Because it is a script and not an application, it does not need the VB Set command. All the commands are standard to VB coding.

This script is designed to update a message without an expiration date, not to create a new message every time. For more information about how to get or create a Siebel Application Object, see *Configuring Siebel Business Applications*

> **Note:**   The code in this example updates single value fields. For information about how to update multi-value fields, see *Configuring Siebel Business Applications*.

```
'Get "Broadcast Message" BusComp
   Set BusObj = SiebelApplication.GetBusObject("Broadcast Message", errCode)
   Set BusComp = BusObj.GetBusComp("Broadcast Message", errCode)
'Find "Calls Waiting" message
   BusComp.SetSearchSpec "Abstract", "Calls In Queue", errCode
   BusComp.ExecuteQuery 0, errCode
   If BusComp.FirstRecord(errCode) <> True Then
'We need to create a new message
   BusComp.NewRecord 0, errCode
   BusComp.SetFieldValue "Abstract", "Calls In Queue", errCode
   End If
'Prepare message using middleware API info.
   Set Msg = "[N]Calls Waiting: [U]10"
'Update the record
   BusComp.SetFieldValue "Body", Msg, errCode
   BusComp.SetFieldValue "All", "Y", errCode
Write the record
   BusComp.WriteRecord errCode
```

In addition to writing a script, you can use Siebel Business Process Designer to create or update a message. For more information, see *Siebel Business Process Framework: Workflow Guide*.

Configuring Notifications Caching

The following task describes how to configure your Siebel Business Applications to take advantage of notifications caching. For information about activating the Check New Broadcast Message workflow policy, see *Siebel Business Process Framework: Workflow Guide.*

> **Note:**   Notifications administration is not supported on Mobile Web Clients when notifications caching is enabled. Make additions, edits, and deletions to the Message Broadcasts list only when connected to the server.

This task is a step in

To configure notifications caching

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

2. From the Enterprise Servers list, select the enterprise server that runs the Siebel application with notifications settings you want to modify.

3. Navigate to the Component Definitions view, and select a component with a Component Type value of Application Object Manager.

4. In the Component Parameters list, select the Application Enable Message Broadcast Cache parameter, and type TRUE in the Value field.

   For details on how to configure the server component or Siebel Application Object Manager parameters, see *Siebel System Administration Guide*.

> **Note:** The default value for the Application Message Broadcast Cache Size parameter is 100. You probably do not have to increase this value. The minimum cache size is the ratio [refresh rate for the notification pane] / [message update interval]. For example, if the refresh rate is every 120 seconds, and the message update interval is every 10 seconds, then set the cache size parameter to at least 12.

5. Enable notifications caching for Developer Web Clients (if any), and add or edit the EnableMsgbroadcastCache parameter in the [Siebel] section in your Siebel application's CFG file as follows:

```
EnableMsgbroadcastCache = TRUE
```

Reviewing Notifications

Managers and the Siebel administrator can use notifications to communicate information to their direct reports and to others in the organization. If the Siebel administrator provides you with the proper authority, then you can customize the behavior of notifications in your user preferences. For more information, see "Setting Up Aspects of Notifications" on page 14-8.

You can access notifications by using the Notification icon on the menu toolbar (shown in Figure 3–3). For more information about the menu toolbar, see "About the Menu Toolbar" on page 3-4.

To review notification messages in the Siebel application

1. Click the Notification icon on the menu toolbar.

The Notification Summary pane (show in Figure 13–1) opens where:

- The messages that you have not read appear at the top of the list.

- The messages that you have already read appear in the Previously Read section. A grayed-out message means that you have already read the message.

- The color of a message indicates the severity level of the message, as shown in the following table.

All notification messages are read-only.

2. Click a message to open and review the details of the message.

- Click any attachment that is part of a message to open and view the attachment.

- Click any hyperlink that is part of a message to navigate to the associated view.

- Click the message again to close it after you have read it.

    - The message moves to the Previously Read section on the Notification Summary pane.

    - The counter beside the Notification icon on the menu banner decreases accordingly.

- Tap Delete (the X icon) to delete a message after you read it.

    After you delete a message, the message disappears from the Notification Summary pane.

3. Click Mark as Read (at the top of the Notification Summary pane) to clear all unread messages and mark them as read

Figure 13–1 Example of Notification Summary Pane
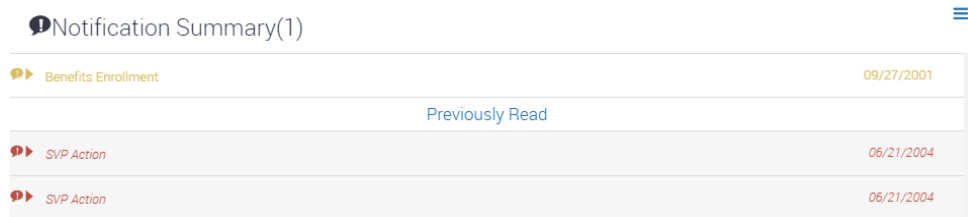
About the Notification Icon and Panes

Note the following about accessing and reviewing notifications:

■ The counter beside the Notification icon on the menu toolbar indicates the number of messages that are waiting for you to read.

   Read messages are not included in the message number that appears beside the Notification icon.

■ If there is one or more message waiting to be read, then the Notification icon shows the color of the highest priority unread message.

   When there are zero messages, the Notification icon appears in a gray color.

■ If the Notification icon is blinking, then you have at least one unread message with a level of importance (or severity) of Urgent with Alert.

   The Notification icon stops blinking after the message is read.

   The Notification icon does not blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.

■ When you click the Notification icon, the Notification Summary pane appears listing the summary text of each message.

   Unread messages appear at the top of the Notification Summary pane and are sorted by message date with later messages listed before earlier messages.

   Read messages appear in italic text below the unread messages and are also sorted by message date with later messages listed before earlier messages.

   When you expand a notification by selecting it, the details appear for that message.

About Colors for Notifications

Colors in notifications indicate the level of importance (or severity) of the message or of specific text in the message. Table 13–2 describes the level of importance for each color in the preconfigured Siebel application.

Table 13–2 Colors for Notifications

Color	Level of Message Importance
Gray	Normal
Yellow	High

Table 13–2   (Cont.) Colors for Notifications

Color	Level of Message Importance
Red	Urgent
Red	Urgent with Alert

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

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

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

14

Setting User Preferences

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

- About User Preferences
- Setting a Default Time Zone
- Setting a Startup View
- Setting Navigation Options
- Setting Themes
- Setting Transition Effects
- Setting Applet Visualization
- Setting Scroll Speeds for Tile Applets
- Setting Confirmation Before Deleting Records Prompt
- Setting Pause Behavior for Task UI
- Setting Outbound Communications Preferences for Send Email
- Setting Up Default Queries
- Viewing Saved Queries
- Setting Up Aspects of Notifications
- Setting Up View Links for Screen Home Pages
- Showing, Hiding, and Reordering Screens or Views
- Setting Up Aspects of the Calendar
- Maintaining Quick Fill Templates
- Setting a User Profile Image
- About Setting Up Synchronization Preferences
- About Availability Fields in the Profile View

About User Preferences

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

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

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

Setting a Default Time Zone

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

To set a default time zone

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

   The User Preferences screen appears.

2. Navigate to the Profile view.

   The Profile form appears.

3. In the Time Zone field, click the select button.

   The Pick Time Zone dialog box appears.

4. Select the time zone, and click OK.

Setting a Startup View

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

To set a startup view

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

   The User Preferences screen appears.

2. Navigate to the Behavior view.

   The Behavior form appears.

3. In the Startup View field, click the select button.

   The Pick Favorite dialog box appears.

4. From the Startup View list in the Pick Favorite dialog box, select the screen and view you want as your startup view.

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

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

   5. Click OK.

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

Setting Navigation Options

By default, the Siebel Open UI client shows the Side Menu icon for navigation control in the Siebel application. This navigation option allows you to access screens from the Side Menu icon, views from the second level view bar and third level view bar, and subviews from the fourth level subview bar. For more information about the Side Menu, see "About the Side Menu" on page 3-3.

The other available navigation options are tab format and tree format.

If you select the tab format for the navigation option, then:

- Screen names appear in screen tabs at the top of the screen.

- View names in the second level view bar appear in a link bar under the screen tabs.

- More view names in the third level view bar appear in view tabs lower on the screen.

- Subview names in the fourth level subview bar appear in a link bar under the view tabs lower on the screen.

If you select the tree format for the navigation option, then:

- Screen names appear in tree format on the left side of the screen.

- View names in the second level view bar appear under the screen names.

- More view names in the third level view bar appear in view tabs lower on the screen.

- Subview names in the fourth level subview bar appear when you hover the curser over a view tab lower on the screen.

If you are left-handed, then you can select the tree format so that you can more easily access screens and views.

To set navigation options

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

   The User Preferences screen appears.

2. Navigate to the Behavior view.

   The Behavior form appears.

3. Select the appropriate value from the drop-down list for the Navigation Control field.

Setting Themes

By default, the Siebel Open UI client uses the Aurora theme as the user interface theme. Depending on your deployment of Siebel Open UI, other themes, such as the Synergy or Simplified User Interface (SUI) theme might be available. All themes generally have the same capabilities and you can modify the end user experience to match other application at a site. For more information about the Simplified UI theme, see "About the Simplified User Interface" on page 3-17.

To set themes

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

    The User Preferences screen appears.

2. Navigate to the Behavior view.

    The Behavior form appears.

3. Select the appropriate value from the drop-down list for the Theme field.

    > **Note:** The values available in the drop-down list depend on the value selected in the Navigation Control field.

Setting Transition Effects

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

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

To set the transition effects

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

    The User Preferences screen appears.

2. Navigate to the Behavior view.

    The Behavior form appears.

3. From the drop-down list for the Transition field, choose from the available options.

Setting Applet Visualization

Visualization is a type of configuration that specifies the layout that Siebel uses to display the information in an applet. Card, Compact, Detail, List, and Map are all examples of an applet visualization.

To set the applet visualization

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

    The User Preferences screen appears.

2. Navigate to the Behavior view.

    The Behavior form appears.

3. From the drop-down list for the Visualization field, choose from the available options.

For more information about configuring and changing the applet visualization, see *Configuring Siebel Open UI*.

Setting Scroll Speeds for Tile Applets

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

To set the scroll speeds for tile applets

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

   The User Preferences screen appears.

2. Navigate to the Behavior view.

   The Behavior form appears.

3. Select a value from the drop-down list for the Default Scroll Speed field.

Setting Confirmation Before Deleting Records Prompt

You can set a prompt to appear when deleting records asking for confirmation to delete the records.

To set the confirmation before deleting records prompt

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

   The User Preferences screen appears.

2. Navigate to the Behavior view.

   The Behavior form appears.

3. Select the check box for the Confirm Before Deleting Record field.

Setting Pause Behavior for Task UI

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

To set the pause behavior for Task UI

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

   The User Preferences screen appears.

2. Navigate to the Behavior view.

   The Behavior form appears.

3. Select the check box for the Prompt to Pause When a User Interrupts a Task field.

Setting Outbound Communications Preferences for Send Email

This topic describes how to set user preferences that affect the Send Email command. For more information about the sending email, see "Sending Email from the Siebel Application" on page 11-3. For information about supported versions of Microsoft Outlook and Lotus Notes email client software, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

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

To set outbound communications preferences for Send Email

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

   The User Preferences screen appears.

2. Navigate to the Outbound Communications view.

   The Outbound Communications form appears.

3. In the Send Email section, complete the fields as need.

   Some fields are described in the following table.

Field	Description
Upon Sending Messages Generate	Select activity generation for messages sent using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. Options are:
	■ **No Activities.** No activity records are generated by sending an outbound message.
	■ **Private activities.** Sets the Internal flag to TRUE for an activity record generated by sending an outbound message. Only the message sender can view the activity record.
	■ **Public activities.** Sets the Internal flag to FALSE for an activity record generated by sending an outbound message. Other users, in addition to the message sender, can view the activity record.
	The specific results of the Internal flag of FALSE or TRUE depend on your Siebel implementation. For more information, contact your Siebel administrator.
Default Profile	Select the default communications profile to use for the Send Email and Send Fax commands. The profile stores various communications settings and provides access to the communications driver that transfers information between the Siebel application and the email/fax server. For example, a profile for the Internet SMTP/POP3 Server driver handles outbound communications using the SMTP protocol.
	You can access any profiles that are associated with your Siebel responsibility setting, and any profiles that you create for your personal use by using the My Profiles view in the Communications screen. The ability to create personal communications profiles is not available for some responsibility settings.
	The default profile information is copied to the From field in the Send Email and Send Fax dialog boxes. You can specify a different profile by choosing another value from the drop-down list for the From field.

Field	Description
Default Recipient Class	Select the default choice for where recipient email or fax address information is populated in an outbound message. Options are: To, Cc, and Bcc.
	In some contexts, the Send Email and Send Fax commands allow you to choose email or fax recipients from data stored in certain fields of the current record. This field applies if you choose a recipient for one of these current field values.
	For example, you might generally want to populate recipients to the To field. However, because of your typical activities or workflow and your company's business needs, it might be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.
Email Client	Select the email client to use when the Send Email command is selected. Options are: Lotus Notes, Microsoft Outlook, Siebel Email Client, and External Email Client.
Siebel/Outlook Form	Select your preferred outbound email form when Email Client is set to Microsoft Outlook, if you prefer a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see *Siebel Email Administration Guide*.
Siebel/Lotus Form	Select your preferred outbound email form when Email Client is set to Lotus Notes, if you prefer a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see *Siebel Email Administration Guide*.
Default Message Format	Select the type of formatting to use for outbound email messages that are sent using the Send Email command. Options are HTML and Plain Text. For more information about using the HTML message format, see "Using the HTML Editor" on page 11-4.

Setting Up Default Queries

You can set up queries to display data when you access a specific screen and view. For more information about queries, see Chapter 7, "Using Query to Locate Information."

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

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

To set up a default query

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

   The User Preferences screen appears.

2. Navigate to the Default Queries view.

3. In the Screen list at the top of the screen, select the screen.

4. In the Screen View list below the list of screens, select the view.

5. Click the Default Query field for the view you select, and click the select button.

    The Pick Query dialog box appears.

6. From the Pick Query dialog box, select the query you want the view to show, and click OK.

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

Viewing Saved Queries

You can view existing queries that you previously saved. For more information about queries, see Chapter 7, "Using Query to Locate Information."

To view a saved query

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

    The User Preferences screen appears.

2. Navigate to the Saved Queries view.

    The Saved Queries list appears.

Setting Up Aspects of Notifications

If your Siebel administrator provides you with the proper authority, then you can set up notifications. You can configure the behavior of the Notification icon and the notification panes. For more information, see Chapter 13, "Using Notifications".

To set up notifications

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

    The User Preferences screen appears.

2. Navigate to the Message Broadcasting view.

    The Message Broadcasting form appears.

3. In the Message Broadcasting form, complete the fields as needed.

    Some fields are described in the following table.

Field	Description
Scroll Speed	Select a speed at which messages scroll across the bottom of the application window. Values include: Stopped, Slow, Medium, or Fast. This field does not apply to the Siebel Open UI client.
Arrow Scroll Speed	Select a speed at which messages scroll when you click the arrows at either end of the message bar. Values include: Stopped, Slow, Medium, or Fast. This field does not apply to the Siebel Open UI client.
Mouseover Pause Speed	Select a speed at which the messages scroll when your place your cursor over the message bar. Values include: Stopped, Slow, Medium, or Fast. This field does not apply to the Siebel Open UI client.
Update Interval (Seconds)	Type the time interval in seconds at which you want notifications to refresh. This field applies to the Notification icon and notification panes.

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

Setting Up View Links for Screen Home Pages

You can set up view links to appear in the view links area in screen home pages. For more information about the main elements in home pages, see "Home Pages for Screens" on page 3-9.

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

To add a view link to a screen home page

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

    The User Preferences screen appears.

2. Navigate to the View Links view.

    The Screen Homepages list appears.

3. In the Screen Homepages list, select the home page for which you want to add a view link.

    If view links exist for the home page, then the View Links list shows those links.

4. In the View Links list, click the plus (+) icon.

5. Complete the fields as needed.

    Some of the fields are described in the following table.

Field	Description
Sequence	Type a number that determines the place of the link in the view links area of the screen home page.
Active	Select this check box to indicate this link is an active view link.
Name	Type a name for the link.
Description	Type a long description for the link.
View	Select a view in the Pick Screen View dialog box that appears when you click the select button in this field.
Default Query	Select a default predefined query for the view you select in the View field.

Showing, Hiding, and Reordering Screens or Views

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

Showing or Hiding Screens

You can show or hide screens.

To show or hide screens

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

   The User Preferences screen appears.

2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.

3. In the Screen Tab Layout list, select the record for the screen you want to show or hide, and do one of the following:

   ■ Clear the Hide check box to show the screen.

   ■ Select the Hide check box to hide the screen.

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

Showing or Hiding Views

You can show or hide views.

To show or hide views

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

   The User Preferences screen appears.

2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.

3. In the Screen Tab Layout list, select the record for the screen associated with the view you want to show or hide.

   The View Tab Layout list shows the views for the selected screen.

4. In the View Tab Layout list, select the record for the view you want to show or hide, and do one of the following:

   ■ Clear the Hide check box to show the view.

   ■ Select the Hide check box to hide the view.

Changing the Order of Screens

You can change the order in which screens appear.

To change the order in which screens appear

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

   The User Preferences screen appears.

2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.

3. In the Screen Tab Layout list, type a whole number in the Order field for each screen to define the position of that screen.

   The number in the Order field is used to re-sequence the screens in ascending order. If you use the same number in the Order field for more than one screen, then the screens with the same number appear in alphabetical order.

Changing the Order of Views

You can change the order in which views appear.

To change the order in which views appear

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

   The User Preferences screen appears.

2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.

3. In the Screen Tab Layout list, select the record for the screen for which you want to reorder views.

   The View Tab Layout list shows the views for the selected screen.

4. In the View Tab Layout list, type a whole number in the Order field for each view to define the position of that view.

   The number in the Order field is used to re-sequence the views in ascending order. If you use the same number in the Order field for more than one view, then the views with the same number appear in alphabetical order.

Setting Up Default Views for Screens

You can set up a default view for a screen.

To set up a default view for a screen

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

   The User Preferences screen appears.

2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.

3. In the Screen Tab Layout list, select the screen for which you want to set up a default view.

4. In the View Tab Layout list, select the Default View check box for the view you want as the default view for the screen.

Setting Up Aspects of the Calendar

To better suit your needs, you can set up aspects of your calendar from the Calendar view of the User Preferences screen. For information about using the calendar, see Chapter 12, "Using the Calendar."

This topic contains the following information:

- "Setting the Length of a Workday" on page 14-12
- "Setting Up Default Calendar Activity Duration" on page 14-13
- "Activating Alarms for All Calendar Activities" on page 14-13
- "Setting Up Default Alarm Lead Times" on page 14-13
- "Setting Up Default Alarm Snooze Times" on page 14-14
- "Setting Up Email Prompts for Meetings" on page 14-14
- "Setting Up Default Calendar Formats" on page 14-14
- "Setting Up Another User's Calendar as Your Default Calendar" on page 14-15
- "Setting Up Default Display for Participant Schedule" on page 14-15

Setting the Length of a Workday

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

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

To change the start time and end time of your workday

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

   The User Preferences screen appears.

2. Navigate to the Calendar view.

   The Calendar form appears.

3. Enter the calendar start time in the Working Hours Start At field.

4. Enter the calendar end time in the Working Hours End At field.

Setting Up Default Calendar Activity Duration

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

To set up a default calendar activity duration

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

   The User Preferences screen appears.

2. Navigate to the Calendar view.

   The Calendar form appears.

3. From the drop-down list for the Appointment Duration field, select the activity length (in minutes).

Activating Alarms for All Calendar Activities

Alarms notify users of upcoming activities. You can specify this alarm activation for every calendar activity you create.

To activate alarms for all calendar activities

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. Select the check box for the Default Alarm field.

   > **Note:** Clear the Default Alarm check box to inactivate alarms for all activities. Only activities you create after you clear the Default Alarm check box are inactivated.

Setting Up Default Alarm Lead Times

You can specify an amount of time before the start of an activity to designate when alarm notification occurs. For information about alarm preferences, see the information about system preferences in *Siebel Applications Administration Guide*.

To set up the default alarm lead time

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. From the drop-down lists for the Alarm Lead Time field, select a time between 5 and 120 minutes.

   Instead of minutes, you can select hours, days, and weeks. The time that you select is the time interval before appointments or reminders that all alarms trigger.

Setting Up Default Alarm Snooze Times

You can set up one snooze time for all your alarms.

To set up a default snooze time

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar screen appears.

3. From the drop-down lists for the Snooze Period field, select a time between 15 and 120 minutes.

   Instead of minutes, you can select hours, days, and weeks. The time that you select is the time interval before alarms trigger a second time after postponing them.

Setting Up Email Prompts for Meetings

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

To set up an email prompt for a meeting

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

   The User Preferences screen appears.

2. Navigate to the Calendar view.

   The Calendar form appears.

3. Select the check box for the Participant Email Prompt field.

Setting Up Default Calendar Formats

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

To set up a default calendar format

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

   The User Preferences screen appears.

2. Navigate to the Calendar view.

   The Calendar form appears.

3. From the drop-down list for the Default Calendar field, choose Daily, Weekly, or Monthly.

4. If you select Daily as the Default Calendar, then select the time interval for activity periods in the calendar from the drop-down list for the Time Interval (Minutes) field.

5. If you select Weekly as the Default Calendar, then do the following:

   a. Select the default weekly calendar format from the drop-down list for the Weekly Calendar View field.

   b. Select the time interval for activity periods in the calendar from the drop-down list for the Time Interval (Minutes) field.

    c. In the Workdays section, select the week days to appear in the calendar from the check boxes for each day of the week.

6. If you select Monthly as the Default Calendar, then make no further selections.

Setting Up Another User's Calendar as Your Default Calendar

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

To set up another user's calendar as your default

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

The User Preferences screen appears.

2. Navigate to the Calendar view.

The Calendar form appears.

3. Click the select button in the Default User field.

The Pick Default User dialog box appears.

4. Select the appropriate user, and click OK.

That user's login appears in the Default User field, and that user's calendar appears as your default calendar in the Calendar screen.

Setting Up Default Display for Participant Schedule

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

To set up a default display for the participant schedule

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

The User Preferences screen appears.

2. Navigate to the Calendar view.

The Calendar form appears.

3. From the drop-down list for the Participant Chart Display field, choose Working Hours or 24 Hours.

Maintaining Quick Fill Templates

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

Renaming Quick Fill Templates

You can rename a quick fill template.

To rename a quick fill template

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

The User Preferences screen appears.

2. Navigate to the Quick Fill Templates view.

The Templates list appears.

3. Select the template you want to rename.

4. In the Template Name field, type a new name for the quick fill template.

5. (Optional) In the Description field, change the description of the template.

Deactivating Quick Fill Templates

You can deactivate a quick fill template.

To deactivate a quick fill template

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

   The User Preferences screen appears.

2. Navigate to the Quick Fill Templates view.

   The Templates list appears.

3. Select the template you want to deactivate.

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

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

Reactivating Quick Fill Templates

You can reactivate a quick fill template.

To reactivate a quick fill template

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

   The User Preferences screen appears.

2. Navigate to the Quick Fill Templates view.

   The Templates list appears.

3. Select the template you want to reactivate.

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

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

Deleting Quick Fill Templates

You can permanently delete a quick fill template.

To permanently delete a quick fill template

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

   The User Preferences screen appears.

2. Navigate to the Quick Fill Templates view.

   The Templates list appears.

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

4. At the confirmation dialog box, click OK.

Adding Quick Fill Template Options in an Applet Menu

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

To add Quick Fill Template options in an applet menu

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

2. Navigate to the Applet Method Menu Items list for the applet.

   An Applet Method Menu Item defines a menu item in the applet-level menu for the parent Applet object definition. For more information about Applet Method Menu Items, contact your Siebel administrator.

3. In the Applet Method Menu Items list, add the records in the following table.

Command Field Value	Menu Text Field Value
ApplyTemplate	Apply Template
SaveTemplate	Save as Template
NewFromTemplate	New From Template
NewFromLastTemplate	NewFromLastTemplate

Setting a User Profile Image

The following procedure shows you how to set a user profile image for the Siebel application, which involves uploading a user profile image to Siebel Server. This uploaded user profile image will appear instead of the default generic photo for the Settings icon on the menu toolbar (shown in Figure 3–3).

To upload a user profile image to Siebel Server

1. Log in to the Siebel business application.

2. Navigate to the Administration - User screen, then the Persons view.

3. Select the record whose user profile image you want to personalize.

4. Go to the Image field on the form that appears and do one of the following as required:

   - Type the full relative path to an image on a local server, for example, as follows:

     c:/images/photo.png

   - Type the full URL address to an image stored externally, for example, as follows:

     http://<xyz.server.com>/-7rbVFtLM9yE/AAAAAAAAAAI/AAAAAAAAAAA/lCL18P-yc8I/s96-c/photo.jpg

5. Save the changes when finished.

   When the user next logs in to the application, Settings on the application banner shows the logged in user's profile image that is uploaded to the Siebel Server, and not the default generic photo.

About Setting Up Synchronization Preferences

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

About Availability Fields in the Profile View

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

15

Using Keyboard Shortcuts

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

- Keyboard Shortcuts
- About Keyboard Shortcuts Tables
- Application Management Keyboard Shortcuts
- Online Help Keyboard Shortcuts
- General Navigation Keyboard Shortcuts
- Layout Management Keyboard Shortcuts
- Record Management Keyboard Shortcuts
- Record Navigation Keyboard Shortcuts
- Query Management Keyboard Shortcuts
- Field Management Keyboard Shortcuts
- Communication Management Keyboard Shortcuts
- Call Management Keyboard Shortcuts

Keyboard Shortcuts

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

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

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

About Keyboard Shortcuts Tables

The keyboard shortcuts in this chapter are organized in category tables according to the actions they perform. The context column indicates where in the Siebel application you perform each action because keyboard shortcuts are based on Siebel application context, or focus rules. If a command is not available in the Siebel application, then the keyboard shortcut is not active.

Some keyboard shortcuts described in the tables in this chapter do not execute the designated action in all browsers. Also, if a keyboard shortcut for an action in a table is the same keyboard shortcut for a different action in your browser, then the resulting action might be the action for your browser.

> **Note:** The keyboard shortcuts described in this chapter are included in the Siebel application. If your Siebel administrator changes the configuration of these keyboard shortcuts, then your keyboard shortcuts might be different. Because of the browser that you use, it might be necessary to change the default keyboard shortcuts in your browser preferences or in your Siebel Business Applications. If you encounter difficulties using your keyboard shortcuts, then contact your Siebel administrator.

Application Management Keyboard Shortcuts

Table 15–1 lists the keyboard shortcuts you can use to perform general activities in the Siebel application

Table 15–1   Application Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Synchronize the database.	SHIFT+F5	Application
Update the audit cache.	CTRL+ALT+X	Application
Connect as new mobile user.	CTRL+SHIFT+W	Application
Log out.	CTRL+SHIFT+X	Application

Online Help Keyboard Shortcuts

Table 15–2 lists the keyboard shortcuts you can use to access options available on the Help application-level menu.

Table 15–2   Online Help Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Display the online help.	CTRL+H	Screen
Display information about a record.	CTRL+ALT+K	Record
Display technical support information, including system information.	CTRL+ALT+J	Application

General Navigation Keyboard Shortcuts

Table 15–3 lists the keyboard shortcuts you can use to navigate in the Siebel application.

Table 15–3   General Navigation Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the Site Map.	CTRL+SHIFT+A	Application
Go to the application-level menu.	CTRL+ALT+M	Application
Go to the screen tabs.	CTRL+SHIFT+T (Siebel shortcut.)	Application
	INSERT+CTRL+R (JAWS shortcut)	
	Note that CTRL+SHIFT+T is the shortcut, but for JAWS users it is recommended that you use the INSERT+CTRL+R Region List command.	
	Note that CTRL+SHIFT+T is not available in Google Chrome.	
Go to the view tabs.	CTRL+ALT+T (Siebel shortcut)	Application
	INSERT+CTRL+R (JAWS shortcut)	
	Note that CTRL+ALT+T is the shortcut, but for JAWS users it is recommended that you use the INSERT+CTRL+R Region List command.	
Go to the subview tabs.	CTRL+ALT+V (Siebel shortcut.)	Application
	INSERT+CTRL+R (JAWS shortcut)	
	Note that CTRL+ALT+V is the shortcut, but for JAWS users it is recommended that you use the INSERT+CTRL+R Region List command.	
	Note that CTRL+ALT+V is not available in Google Chrome.	
Open the Cogwheel icon window on a list or form.	CTRL+SHIFT+M	List, form
	CTRL+SHIFT+G	
	Note that CTRL+SHIFT+M is not available on Mozilla Firefox.	
Go to the next list or form.	CTRL+SHIFT+]	Application
	CTRL+ALT+]	
Go to the previous list or form.	CTRL+SHIFT+[	Application
	CTRL+ALT+[	
Open the Tasks pane.	CTRL+SHIFT+Y	Application
Go to a tree applet.	CTRL+SHIFT+4	Application
Go to the previous tree applet node.	UP ARROW	Application
Go to the next tree applet node.	DOWN ARROW	Application
Go to the field for the visibility filter.	CTRL+SHIFT+V	Application

Layout Management Keyboard Shortcuts

Table 15–4 lists the keyboard shortcuts you can use to change the appearance of lists in the Siebel application.

Table 15–4   Layout Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Sort a single column.	ENTER	List column header
Open a dialog box to perform advanced sorting.	CTRL+SHIFT+O	List
Open a dialog box to select the displayed columns.	CTRL+SHIFT+K CTRL+SHIFT+B	List

Record Management Keyboard Shortcuts

Table 15–5 lists the keyboard shortcuts you can use when performing record management tasks in Siebel CRM.

Table 15–5   Record Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Create a new record.	CTRL+N (CTRL+ALT+N in Google Chrome) Note that if the list has a plus icon (+, for adding records) and a double plus icon (++, for creating new records), then CTRL+N opens an Add Record window from where you can do the following: ■ Select a record to add to the list. ■ Click the plus (+) icon, provided the Add Record window has a plus icon, or click CTRL+N to create a new record. Note that CTRL+N is not available in Google Chrome, so use CTRL+ALT+N instead.	List, form
Create a new record using a Quick Fill template.	CTRL+K	Form
Create a new record using the last used Quick Fill template.	CTRL+J	Form
Apply a Quick Fill template to a record.	CTRL+Q	Form
Copy a record.	CTRL+B	Record
Save a record.	CTRL+SHIFT+S CTRL+S (If you use this shortcut to save a record that has an invalid value in a field, then the Save As dialog box appears in error.)	List, form
Delete a record.	CTRL+D Note that CTRL+D is not available in Mozilla Firefox, so it is recommended that you alter this shortcut accordingly. CTRL+ALT+D is the recommended option on Mozilla Firefox.	Record

Table 15–5   (Cont.) Record Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Undo a record.	ESC	Record
Select all records.	CTRL+ALT+A (This applies when each record appears with a check box.) CTRL+A	List

Record Navigation Keyboard Shortcuts

Table 15–6 lists the keyboard shortcuts you can use to navigate to records in the Siebel application.

Table 15–6   Record Navigation Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the previous record.	CTRL+SHIFT+, (comma) CTRL+UP ARROW ALT+, (comma)	List, form
Go to the next record.	CTRL+SHIFT+. (period) CTRL+DOWN ARROW ALT+. (period)	List, form
Go to the previous record set.	CTRL+ALT+, (comma)	List
Go to the next record set.	CTRL+ALT+. (period)	List
Go to the first record set.	ALT+U	List, form
Go to the last record set.	ALT+L	List, form

Query Management Keyboard Shortcuts

Table 15–7 lists the keyboard shortcuts you can use to work with queries in Siebel CRM.

Table 15–7   Query Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Create a new query.	ALT+Q	List, form
Run a query.	ALT+ENTER CTRL+ENTER	List, form
Refine a query.	ALT+R ALT+G	List, form
Save a query with different name.	CTRL+ALT+S ALT+S	List, form
Open a dialog box for the query assistant.	CTRL+SHIFT+Z	List, form
Cancel a query.	CTRL+SHIFT+9	List, form

Field Management Keyboard Shortcuts

Table 15–8 lists the keyboard shortcuts you can use when performing field management tasks in Siebel CRM.

Table 15–8   Field Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Open a selection dialog box for a field.	F2	Field
Open the calendar control for a field.		
Open the calculator control for a field.		
Close a selection dialog box for a field.	CTRL+ALT+O	Field
Open a drop-down list for a field.	F2	Field
	DOWN ARROW	
Drill down on a field.	CTRL+SHIFT+SPACE	Field

Communication Management Keyboard Shortcuts

Table 15–9 lists the keyboard shortcuts you can use to share information with others in Siebel CRM.

Table 15–9   Communication Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Go to the Correspondence screen to send a letter.	CTRL+L	Record
Open a dialog box to send an email.	F9	Record
Open a dialog box to send a fax.	CTRL+F9	Record
Open a dialog box to send a page.	SHIFT+F9	Record
Open a dialog box to send an outbound wireless message.	ALT+F9	Record
View a work item.	SHIFT+F8	Record
Set work mode to ready.	CTRL+F2	Record
Set work mode to not ready	CTRL+F3	Record
Set work mode to other.	CTRL+F4	Record
Set work mode to after call work.	CTRL+F5	Record
Set work mode to busy.	CTRL+F6	Record

Call Management Keyboard Shortcuts

Table 15–10 lists the keyboard shortcuts you can use when calling others in Siebel CRM.

Table 15–10   Call Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Associate call.	F8	Call
Blind transfer of a call.	ALT+F7	Call
Transfer a conference call.	CTRL+F7	Call
Consultative transfer of a call.	SHIFT+F7	Call

Table 15–10   (Cont.) Call Management Keyboard Shortcuts

Action	Keyboard Shortcut	Context
Release a call.	F12	Call
Make a call.	F7	Call
Make a finance call.	CTRL+SHIFT+F	Call
Make an insurance call.	CTRL+SHIFT+I	Call
Answer a call.	F6	Call
Set work mode to post call wrap-up.	CTRL+F5	Call

A

Accessibility for Siebel Business Applications

This appendix provides information about accessibility for Siebel Business Applications. It includes the following topics:

- About Section 508 Accessibility
- About Web Content Accessibility Guidelines
- About the Voluntary Product Accessibility Template
- About Screen Readers
- About Utilities for Visually Impaired Users
- About Utilities for Physically Disabled Users
- About Keyboard Navigation in Accessible Rich Internet Applications

About Section 508 Accessibility

In 1998, the United States Congress amended the Rehabilitation Act to require federal agencies to make their electronic and information technology accessible to people with disabilities. Inaccessible technology interferes with ability of these individuals to obtain and use information quickly and easily. Section 508 was enacted in the U.S. to eliminate barriers in information technology, to make available new opportunities for people with disabilities, and to encourage development of technologies that help achieve these goals. The Access Board, a U.S. government agency, developed accessibility standards for the various technologies that the law covers. These standards are folded into the procurement regulations for the federal government.

The law applies to all U.S. government agencies that develop, procure, maintain, or use electronic and information technology. Under Section 508, agencies must give disabled employees and members of the public access to information that is comparable to the access available to others.

> **Note:** Section 508 undergoes review to address recent internet technology developments. You can review the laws and regulations to further your understanding about Section 508 and how you can support implementation.

For more information about Section 508, visit the Section 508 Web site at:

http://www.section508.gov/

For more information about the Access Board, visit the United States Access Board Web site at:

http://www.access-board.gov/

For information about Oracle's Accessibility Program, visit Oracle's Accessibility Program Web site at:

http://www.oracle.com/accessibility

About Web Content Accessibility Guidelines

The Web Content Accessibility Guidelines (WCAG) explain how to make Web content accessible to people with disabilities. Web content generally refers to the information in a Web page or Web application, including text, images, forms, and sounds. WCAG are part of a series of accessibility guidelines, including the Authoring Tool Accessibility Guidelines (ATAG) and the User Agent Accessibility Guidelines (UAAG). The Web Content Accessibility Guidelines Working Group (WCAGWG) developed WCAG technical documents. The WCAGWC is part of the Web Accessibility Initiative (WAI) for the World Wide Web Consortium (W3C).

Version 2.0 of the WCAG was approved in December of 2008. This version is stable, and it is the recommended version to use for reference. Version 2.0 of the WCAG is developed to do the following:

- To apply broadly to different technologies now and in the future

- To be easier to use and understand

- To be more precise when testing with automated testing tools and human evaluation

For information about Version 2.0 of WCAG, visit the Web Accessibility Initiative Web site at:

http://www.w3.org/WAI/

About the Voluntary Product Accessibility Template

The accessibility status of each Oracle product is reported in a Voluntary Product Accessibility Template (VPAT). The VPAT was created by a partnership of the Information Technology Industry Council (ITIC) and the U.S. General Services Administration (USGSA) to create a simple document that U.S. government contracting and procurement officials can use to evaluate a product with respect to the provisions in Section 508. The Siebel Open UI client has a VPAT. Administrators do not need to configure the Siebel Open UI client in order for people with disabilities to use the client.

Because products are on different release cycles, or because Oracle might have recently acquired products, not all Oracle products meet all of the guidelines.

For more information about VPAT, visit Oracle's Accessibility Program Web site at:

http://www.oracle.com/accessibility

About Screen Readers

The Siebel Open UI client supports screen readers that work in browser-based applications. Screen readers provide an audible description of the field contents as you navigate through the user interface. It is recommended that you use screen readers that comply with Accessible Rich Internet Applications (ARIA).

The Siebel Open UI client supports screen readers that are browser-compatible because it is a standards-based Web application. Some browsers interpret Accessible Rich Internet Applications (ARIA) and Version 2.0 of Web Content Accessibility Guidelines (WCAG) better than other browsers. Use the appropriate browser for your Siebel implementation. Consult with the vendor for your screen reader to use it with a Siebel application.

If you use a screen reader, then you hear the levels of the bar region that denote user interface areas. Table A–1 shows the level of the bar region that corresponds to each user interface area that sighted users work with.

Table A–1   Levels of Bar Region for User Interface Areas

User Interface Area	Level of Bar Region
One of the following: ■ The list that appears when you click the Side Menu. ■ The screen tabs that appear across the top of the screen. ■ The screen names that appear in tree format on the left side of the screen.	First level
One of the following: ■ The views that appear in the second level view bar. ■ The views that appear in a link bar under the screen tabs. ■ The view names that appear in tree format on the left side of the screen.	Second level
One of the following: ■ The views that appear in the third level view bar. ■ The view tabs that appear lower on the screen.	Third level
One of the following: ■ The subviews that appear in the fourth level subview bar. ■ The subviews that appear in a link bar under the view tabs lower on the screen. ■ The subviews that appear when you hover the curser over a view tab lower on the screen.	Fourth level

About Utilities for Visually Impaired Users

In the Siebel Open UI client, people with visual impairment can use screen magnification utilities to enlarge selected text and other on-screen elements for easier viewing. Several operating systems supply magnification utilities. Also, you can purchase these utilities from third-party vendors. The Siebel Open UI client supports magnification utilities that work in browser-based applications.

In the Siebel Open UI client, people with visual impairment can use zoom features and high-contrast options for browsers to facilitate viewing.

About Utilities for Physically Disabled Users

In the Siebel Open UI client, people with physical disabilities can use utilities, such as soft keyboards, voice control, and StickyKeys, to work with data. The keyboard-usage model for the Siebel Open UI client recognizes these utilities. For more information about using these utilities in browser-based applications, consult the vendor for the utility or the vendor for the operating system.

About Keyboard Navigation in Accessible Rich Internet Applications

The Siebel Open UI client supports Accessible Rich Internet Applications (ARIA). ARIA define a way to make Web content and Web applications more accessible for people with disabilities and easier to use for all users. ARIA especially help in navigating within dynamic content and in using advanced user interface controls developed with Ajax, HTML, JavaScript, and related technologies.

ARIA include a collection of common, semantic landmarks that apply to each navigable region in a Siebel application. These landmarks allow a person with disabilities to use an assistive-technology product, such a screen reader, to navigate in a Siebel application. Landmarks provide a consistent navigation experience in which a pointing device, such as a mouse, is unnecessary.

Examples of landmarks include: the application-level menu, the application toolbar, screen names, view names, lists, visibility filters, and forms. If you use a JAWS screen reader, you can press CTRL + INSERT+; (semicolon) to display a dialog box that describes the landmarks. For more information about using the keyboard to navigate in Oracle's Siebel Business Applications, see "About Keyboard Navigation" on page 3-15.

For information about ARIA, visit the Web Accessibility Initiative Web site at:

http://www.w3.org/WAI/

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