Siebel Fundamentals

Version 8.0, Rev. B

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1 What’s New in This Release

What’s New in Siebel Fundamentals, Version 8.0, Rev. B

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What’s New in Siebel Fundamentals, Version 8.0, Rev. A

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

Table 1. New Product Features in Siebel Fundamentals, Version 8.0, Rev. A

Topic	Description
Enhanced the query information. See “Case and Accent Insensitive Queries” on page 80	Added a topic about the Case and Accent Insensitive Query.
Updated the Search Center information. See “Using Search to Locate Information” on page 91	Included information about the availability of Oracle Secure Enterprise Search (SES). Also specified the search features that are supported for integration with FAST InStream (a third-party search engine) but not supported for integration with Oracle SES.

What's New in Siebel Fundamentals, Version 8.0

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

Table 2. New Product Features in Siebel Fundamentals, Version 8.0

Topic	Description
Enhanced the date format. See "About the Calendar Control" on page 44	Included enhanced functionality for strict date format.
Enhanced the Search Center functionality. See "Using Search to Locate Information" on page 91	Updated information about changes to the search functionality.
New feature introduced in Siebel 8.0. See "Using Task UI" on page 97	Created a new chapter that contains information about the task user interface, how to use it, and describes the navigational buttons of the wizard.
Added new functionality. See "Viewing Saved Queries" on page 148	Added Viewing Saved Queries topic.
Added additional shortcuts. See "Using Keyboard Shortcuts" on page 161	Updated and included additional shortcuts, such as how to open iHelp and Tasks.

2

Getting Started with Your Siebel Application

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

Topics in This Section

"Logging Into Your Siebel Application" on page 14

"Enabling QuickStart Agent for the Siebel Mobile Web Client" on page 15

"About Access and Responsibilities in the Siebel Application" on page 15

"Setting Internet Explorer Options for Calendar Printing" on page 16

"Changing Browser Security Levels" on page 16

"Using Web Browser Back, Forward, History, and Refresh Functions" on page 17

"Using the Inbox" on page 17

"Exiting the Siebel Application" on page 18

Logging Into Your Siebel Application

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

To log in to your Siebel application

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

   A login screen (shown in Figure 1) appears.

2. Enter your user ID and password.

   Contact your system administrator if you are not sure of your user ID, password, or both.

3. Click the arrow button.
4. If the Siebel Browser Check dialog box appears, follow the on-screen instructions.

NOTE: If your browser security setting zone is set to medium or higher, you may be prompted by a security warning window when you launch your Siebel application provided by Oracle. To remove this window and make sure it does not reappear, check the Always trust content from Siebel Systems, Inc. check box.

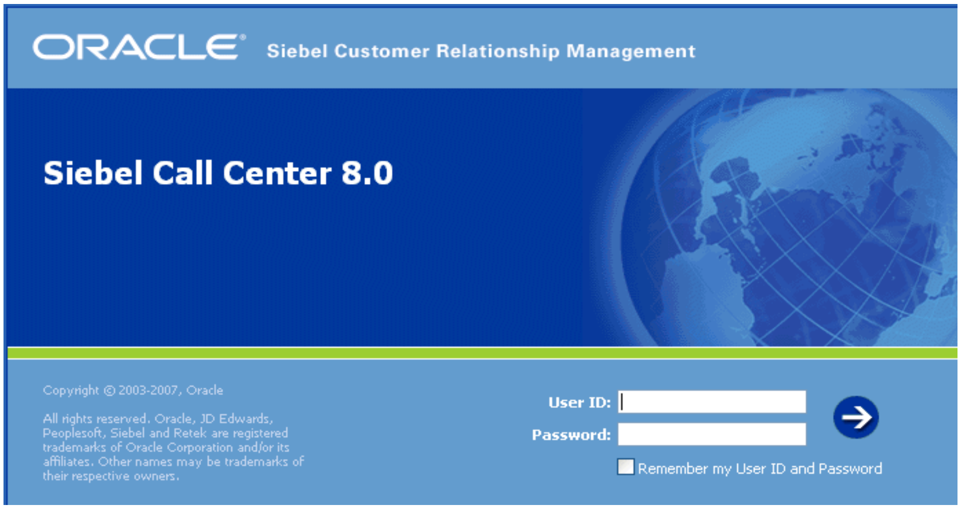
ORACLE
Siebel Customer Relationship Management
Siebel Call Center 8.0
User ID:
Password:
☐ Remember my User ID and Password

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Figure 1. Login Screen Example

About the Demo Application

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

About the Home Page

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

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

The information on your home page is determined by your organization. However, you can remove and rearrange its elements to better manage the information and determine what you see.

Related Topic

"Customizing Home Pages" on page 139

Enabling QuickStart Agent for the Siebel Mobile Web Client

If you are using Siebel Mobile Web Client, you may want to select the Enable Siebel QuickStart check box when you log in. Selecting the Enable Siebel QuickStart check box loads an agent that significantly improves the time it takes to launch the Siebel Mobile Web Client.

For more information about using Siebel QuickStart, contact your Siebel administrator.

About Access and Responsibilities in the Siebel Application

You will be 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 need to access to fulfill those responsibilities, at the time when you log in to the application.

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

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

Here are three factors that could determine what records you can 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 also be assigned to a team. Only the people who have been assigned as team members for the record can see it.

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

Setting Internet Explorer Options for Calendar Printing

If you are using Internet Explorer, you must make sure your Internet options are set up properly to allow for correct calendar printing.

To set Internet Explorer options for Calendar printing

1. Start Internet Explorer.
2. Choose Tools > Internet Options.

   The Internet Options dialog box appears.

3. Click the Advanced tab.
4. Under Printing, select the Print background colors and images check box.
5. Click OK.

Related Topic

"Printing Your Calendar" on page 136

Changing Browser Security Levels

If you want to use Microsoft Excel as your quick print application, you must change a security setting in your Web browser.

To change your Web browser's security setting to use Microsoft Excel as your quick print application

1. Start Internet Explorer.
2. Choose Tools > Internet Options.

   The Internet Options dialog box appears.

3. Click the Security tab.
4. Click the Custom Level button.

   The Security Settings dialog box appears.

5. Under Initialize and script ActiveX controls not marked as safe, select the Prompt option button.
6. Click OK.

7. At the Internet Options dialog box, click OK.

Related Topics

"Setting Quick Print Options" on page 143

"Printing Records" on page 58

Using Web Browser Back, Forward, History, and Refresh Functions

To navigate back and forward in your Siebel application, you can click the Web browser's back and forward buttons or use the keyboard shortcuts described in "Keyboard Shortcuts" on page 162.

To find screens and views that you recently accessed in your application, use the Web browser's history function. To view one of the screens or views that you previously accessed in your current session, click the arrow to the side of the Web browser's back and forward buttons, and then click the screen or view you want from the list.

To refresh data in your Siebel application, it is recommended that you use Siebel query functionality. For more information about querying, see Chapter 9, "Using Query to Locate Information." Using your Web browser's Refresh button resubmits the current URL. This may or may not mean that new data will appear in the application window. The application also rebuilds the memory cache (view layouts). These view layouts will be your most frequently used views. For more information about view layouts and the memory cache, see *Siebel Performance Tuning Guide*.

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

To check your Inbox

1. From the application-level menu, choose Navigate > 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 hyperlink to see details about the work item.

Exiting the Siebel Application

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

To exit the Siebel application

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

3 About the User Interface

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

Topics in This Section

"About Siebel Application Window Components" on page 20

"About the Application-Level Menu" on page 20

"About the Branding Area in the User Interface" on page 21

"About the Application Toolbar" on page 21

"About the Action Pane" on page 22

"About the Search Center" on page 22

"About Case and Accent Insensitive Query" on page 23

"About the Thread Bar in the User Interface" on page 23

"About Screens in the User Interface" on page 23

"About Screen Home Pages" on page 25

"About Views and Subviews in the User Interface" on page 25

"About Using the Drop-Down Arrow for Screen Navigation" on page 28

"About the Link Bar in the User Interface" on page 29

"About Lists in the User Interface" on page 30

"About Forms in the User Interface" on page 33

"About Charts in the User Interface" on page 33

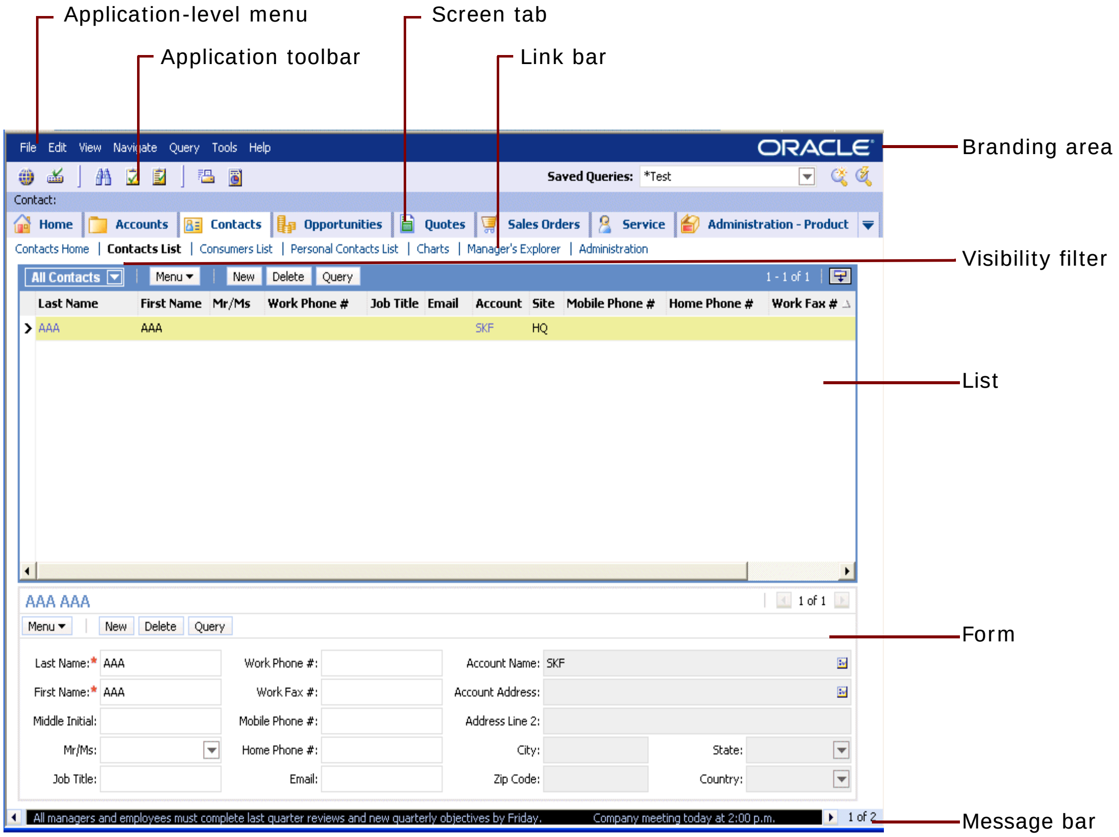
"About Explorer Views in the User Interface" on page 35

"About Common Buttons in Lists and Forms in the User Interface" on page 36

"About the Message Bar in the User Interface" on page 36

About Siebel Application Window Components

Figure 2 shows the main elements of the Siebel application window.


Application-level menu
Application toolbar
Screen tab
Link bar
Branding area
Visibility filter
List
Form
Message bar
File Edit View Navigate Query Tools Help
ORACLE
Home Accounts Contacts Opportunities Quotes Sales Orders Service Administration - Product
Contacts Home | Contacts List | Consumers List | Personal Contacts List | Charts | Manager's Explorer | Administration
All Contacts
Menu New Delete Query
1 - 1 of 1
Menu New Delete Query
1 of 1
1 of 2

Saved Queries: *Test

Contact:

Last Name	First Name	Mr/Ms	Work Phone #	Job Title	Email	Account	Site	Mobile Phone #	Home Phone #	Work Fax #
AAA	AAA					SKF	HQ			

AAA AAA

Last Name:* AAA
First Name:* AAA
Middle Initial:
Mr/Ms:
Job Title:
Work Phone #:
Work Fax #:
Mobile Phone #:
Home Phone #:
Email:
Account Name: SKF
Account Address:
Address Line 2:
City:
Zip Code:
State:
Country:

All managers and employees must complete last quarter reviews and new quarterly objectives by Friday.

Company meeting today at 2:00 p.m.

Figure 2. Example of Siebel Application Window

About the Application-Level Menu

The application-level menu is located in the upper left corner of the application window. The functionality provided by each menu in the application-level menu depends on the application and the configuration you are using. 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 Branding Area in the User Interface

Located in the upper right corner of the application window, the branding area shows the Oracle logo, as shown in Figure 3. It may also show your company's logo.

Figure 3. Example of Logo in Branding Area

About the Application Toolbar

The Siebel application toolbar appears below the application-level menu. The left part of the toolbar, shown in Figure 4, provides access to frequently used tools such as the Site Map. You use the right part of the toolbar, shown in Figure 5, to find information in your Siebel application. The tools available on the application toolbar are described in Table 3.

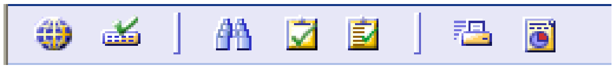
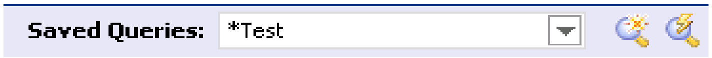


Figure 4. Frequently Used Tools in the Application Toolbar



Saved Queries: *Test

Figure 5. Querying Information with the Application Toolbar

Table 3. Application Toolbar Controls

Control	Name	Description	Related Topic
🌐	Site Map button	Displays the Site Map.	"Using the Site Map" on page 45
🔍	Search button	Activates the Search Center, which allows you to search for and find records within the database.	"Using Search to Locate Information" on page 91
☑	How Do I button	Enables you to access iHelp. iHelp provides guidance with tasks.	"Using iHelp" on page 47
📝	Tasks button	Activates a task UI wizard to guide you through a series of steps to complete a specific task.	"Using Task UI" on page 97

Table 3. Application Toolbar Controls

Control	Name	Description	Related Topic
🖨	Quick Print button	Lets you print the data you are currently viewing. (Depending on your user preferences, this button may be grayed-out.)	“Printing Records” on page 58 “Setting Quick Print Options” on page 143
📊	Reports button	Lets you access reports for the screen you are working in.	“Running Reports” on page 102
Queries drop-down list		Provides access to your saved queries and to the predefined queries established by your organization.	“Using Query to Locate Information” on page 79
🔍	New query button	Launches a new query.	
🔍	Execute query button	Executes a query after you have defined query criteria.	

About the Action Pane

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

- Click on the appropriate icon on the Applications Toolbar.
- From the application-level menu, choose View > Action Pane.

The menu items will be checked if the corresponding pane is open.

The state of the Action Pane is retained across your sessions. For example, if you had the Action Pane open in Task mode when you exited the application on Monday night, the Action Pane will open in Task mode when you log in on Tuesday morning. The same action occurs if the mode was Search or iHelp.

About the Search Center

The Siebel Search function improves the capabilities of the search engine, providing faster performance across a broad data set and offering a more intuitive interface through which you can harness its power. With Siebel Search Center, customers’ large and diverse knowledge repositories are made available to you in a central, transparent, and intuitive interface.

You can begin searching from a simple, intuitive Search Pane, and can then expand your search based on the results obtained from the initial search. You can refine searches, and save them for future use.

An Advanced Search capability allows you to create searches that use more complex logic, such as Boolean or parametric search terms, for more focused searching. Search results mirror the traditional layout that you see on common Internet interfaces, with a document title, short auto-generated summaries, sortable columns, and automated refinements based on keywords and document type. For more information about the Search center, see "Using Search to Locate Information" on page 91.

About Case and Accent Insensitive Query

Where the case and accent insensitive query feature is implemented, database queries performed using Siebel applications ignore both case and the use of accents to return records that otherwise match your query value. This capability is important when searching for records such as contact or customer names where capitalization or the use of accents is not consistent and an exact-match search would not return any records. Case and accent insensitive query applies to the entire query string.

For more information about Case and Accent Insensitive Query, see *Siebel Global Deployment Guide*.

About the Thread Bar in the User Interface

The thread bar, shown in Figure 6, appears immediately below the application toolbar. It helps you keep track of your navigational path when you drill across to a view on another screen using record hyperlinks. You can return to a previous point in the path by clicking the corresponding name on the thread bar. When you drill across screens using record hyperlinks, you remain in the same thread, which means that you may find yourself in a new screen and view, but you will not see all the records available in that screen and view.

For example, if you were in the thread shown in Figure 6, you would see only the opportunities associated with the contact, Davis. If you want to see every opportunity to which you have access, you must click the current screen tab. Similarly, when you navigate to another screen using a screen tab or the Site Map, the thread bar resets and begins tracking your new path.

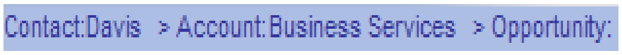


Figure 6. Example of a Thread Bar

About Screens in the User Interface

The application is organized into screens. Each screen covers a broad topic. You access a screen by clicking the related screen tab, such as Opportunities, Calendar, or Accounts, or by using the Site Map.

An active screen tab appears in a different color. Figure 7 shows an example of screen tabs, where Contacts is the active screen tab. You can specify which screen tabs are displayed in your Siebel application.

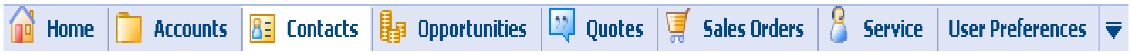

Home
Accounts
Contacts
Opportunities
Quotes
Sales Orders
Service
User Preferences

Figure 7. Example of Screen Tabs

You can change the screen tab icons in Siebel Tools. Contact your Siebel administrator if you do not want to display icons on the screen tabs.

Related Topics

"Using the Site Map" on page 45

"Showing, Hiding, and Reordering Screen and View Tabs" on page 152

About Screen Home Pages

A screen home page is a gateway to the common functions for that screen. Screen home pages may have five main elements which are described in Table 4.

Table 4. Screen Home Page Elements

Location	Label	Description
Left, top	Search	Query area where you can enter your query criteria directly into the fields, and click Go to be taken directly to the list with your query results.
Middle, top	*Screen name*	An area that contains a list of links to the key lists of data with which you most frequently work. This list can be a combination of predefined queries and visibility filters.
Middle, bottom	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.
Right, top	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.
Right, bottom	Add	Add area that you use to add new records. You complete the fields shown in the Add area, and click Add to add the record to the database and stay in the screen home page. You can also click Add & Go to add the record to the database and be taken directly to the form containing the new record you just added.

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

Related Topics

"Customizing Home Pages" on page 139

"Setting Up View Links for Screen Home Pages" on page 151

About Views and Subviews in the User Interface

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

After identifying the desired screen and selecting the screen tab, you must decide what set of records you want to view in the selected screen. In many cases, a default set of records appears in a list below the screen tabs. If this is the case, you can use the visibility filter to access a different set of records. In some cases, a screen home page appears.

You use view tabs after you have drilled down on the record you want to view or change. The view tabs show detailed presentations of data related to the selected record and screen. In some cases, subviews provide access to additional information about a record.

Topics in This Section

"About Using the Visibility Filter in Lists" on page 26

"About View Tabs in the User Interface" on page 27

"About Subviews in the User Interface" on page 28

Related Topics

"About Lists in the User Interface" on page 30

"About Forms in the User Interface" on page 33

"About Charts in the User Interface" on page 33

"About Explorer Views in the User Interface" on page 35

About Using the Visibility Filter in Lists

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

Suppose you need to query for information about an account. However, the account is not owned by you. The default visibility filter for the Accounts screen is My Accounts, which displays only your account records. To perform a query on every account record in the system that you have access to, you use the visibility filter to choose the All Accounts filter. You can then see the account records that you have access to in the system.

Table 5 provides explanations for each value in the visibility filter. The Accounts screen is used as an example, but these filters can appear in any screen. You may not see some filters shown in Table 5, depending on your responsibilities.

NOTE: *My* views show the active login name in the Team field if it appears in the view. *All* views, on the other hand, show the login name of the primary team member in the Team field, if it appears in the view.

Table 5. Visibility Filter Values

Filter	Description
My Accounts	Items that appear in this view are specific to you. You are the only one who can see these items, unless you are a member of a team that has access to them.
My Team’s Accounts	This is typically a manager’s view. It allows a manager to look at the items belonging to that manager’s team. For example, a manager could 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 you have users who report to you.
All Accounts	This allows you to view accounts in the database to which you have access.
All Accounts Across Organizations	This view is for companies that have partnerships with other companies. It allows a user with the appropriate responsibilities to view all of the accounts in all of the companies.

About View Tabs in the User Interface

View tabs appear in the lower part of the application window after you drill down on a record, as shown in Figure 8. The list of available views depends on which screen tab you have selected. Click a view tab to display the desired data for the record you have selected. For example, you may be looking at a contact in the Contacts screen. Clicking the Activities view tab displays the activities associated with this contact.

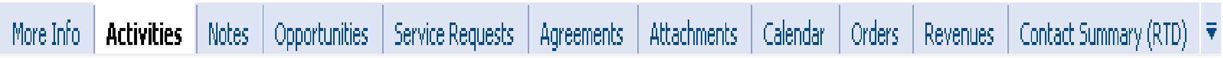


Figure 8. Example of View Tabs

If the view tab you need is not visible, use the drop-down arrow to display and select a different view tab. The drop-down arrow is located at the end of the currently displayed view tabs. It may also be that you do not have a certain view tab set to show in your user preferences. You may also use the Site Map to navigate to a desired view. If you select a view from the Site Map that does not appear as a view tab in your application, a view tab is created when you jump to that view. It will only be visible for the current session.

Link Bar

In some instances, a link bar may appear below the view tabs. This link bar provides access to additional views related to the selected record.

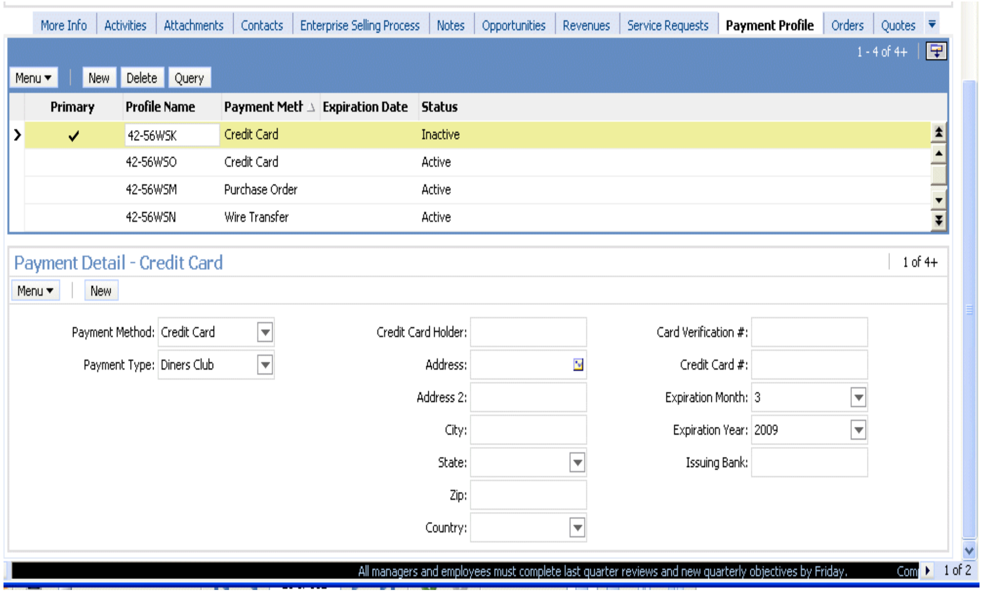
Related Topics

"About the Link Bar in the User Interface" on page 29

"Showing, Hiding, and Reordering Screen and View Tabs" on page 152

About Subviews in the User Interface

Subviews appear directly below the information displayed for a selected view tab. The subview gives you more details about the record selected in the view. Not all views have subviews. If a view has a subview, it appears automatically. Figure 9 shows the Payment Profile list with the Payment Detail subview.


More Info
Activities
Attachments
Contacts
Enterprise Selling Process
Notes
Opportunities
Revenues
Service Requests
Payment Profile
Orders
Quotes
1 - 4 of 4+
Menu
New
Delete
Query

Primary	Profile Name	Payment Meth	Expiration Date	Status
✓	42-56WSK	Credit Card		Inactive
	42-56WSO	Credit Card		Active
	42-56WSM	Purchase Order		Active
	42-56WSN	Wire Transfer		Active

Payment Detail - Credit Card

1 of 4+
Menu
New

Payment Method: Credit Card
Payment Type: Diners Club
Credit Card Holder:
Address:
Address 2:
City:
State:
Zip:
Country:
Card Verification #:
Credit Card #:
Expiration Month: 3
Expiration Year: 2009
Issuing Bank:

All managers and employees must complete last quarter reviews and new quarterly objectives by Friday.

Figure 9. Example of a Subview

About Using the Drop-Down Arrow for Screen Navigation

If you have access to more screens than can be displayed on the screen, you will see a drop-down arrow at the right end of the set of screen tabs. This drop-down arrow lets you display and select a screen. When you select a screen to display, the last screen tab is replaced with the selected screen.

An example of the drop-down arrow for screen navigation is shown to the right of the Campaigns screen tab in Figure 10.

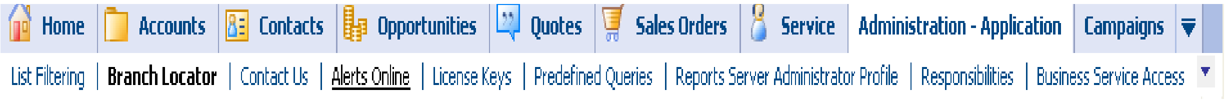

Home
Accounts
Contacts
Opportunities
Quotes
Sales Orders
Service
Administration - Application
Campaigns
List Filtering
Branch Locator
Contact Us
Alerts Online
License Keys
Predefined Queries
Reports Server Administrator Profile
Responsibilities
Business Service Access

Figure 10. Example of Drop-Down Arrow for Screen Navigation

About the Link Bar in the User Interface

Screens contain sets of information shown in views. These views display data in different formats. For example, you can sometimes view the same data in a list, in an explorer view, or in a chart.

You access views by clicking a hyperlink on the link bar, shown in Figure 11 for the Administration-Application screen. In the link bar, the active view appears in bold text (Branch Locator in Figure 11). The link bar appears immediately below the screen tabs. If the view you need is not visible, click the down arrow at the end of the list to display and select another view (the down arrow appears to the right of the Business Service Access hyperlink on the link bar in Figure 11). When you select another view, the last hyperlink on the link bar is replaced with the selected view.

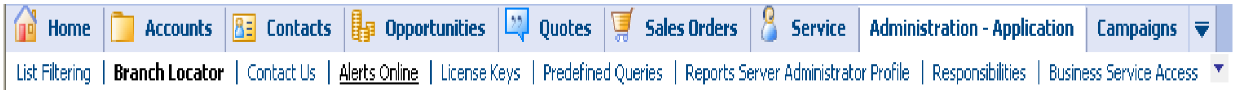

Home
Accounts
Contacts
Opportunities
Quotes
Sales Orders
Service
Administration - Application
Campaigns
List Filtering
Branch Locator
Contact Us
Alerts Online
License Keys
Predefined Queries
Reports Server Administrator Profile
Responsibilities
Business Service Access

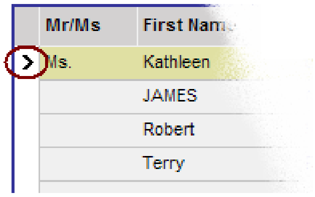
Figure 11. Example of Link Bar and Drop-Down Arrow for Navigation

Related Topic

"About Views and Subviews in the User Interface" on page 25

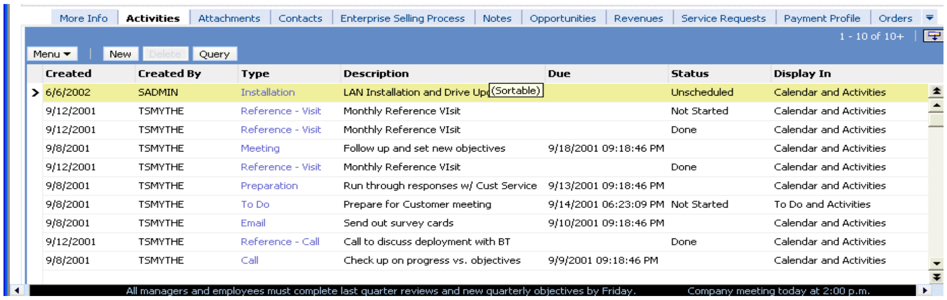
About Lists in the User Interface

A list consists of multiple records, presented as rows. Each record consists of multiple fields. You can select a record in a list by clicking any field in the record. This causes the record to be highlighted and adds an active record indicator to the left of the record. If the field you click is editable, it will go into edit mode and you can enter a value. An example of the active record indicator is shown in Figure 12; a list is shown in Figure 13.



	Mr/Ms	First Nam
>	Ms.	Kathleen
		JAMES
		Robert
		Terry

Figure 12. Example of Active Record Indicator in List



	Created	Created By	Type	Description	Due	Status	Display In
>	6/6/2002	SADMIN	Installation	LAN Installation and Drive Up(		Unscheduled	Calendar and Activities
	9/12/2001	TSMYTHE	Reference - Visit	Monthly Reference VIsit		Not Started	Calendar and Activities
	9/12/2001	TSMYTHE	Reference - Visit	Monthly Reference VIsit		Done	Calendar and Activities
	9/8/2001	TSMYTHE	Meeting	Follow up and set new objectives	9/18/2001 09:18:46 PM		Calendar and Activities
	9/12/2001	TSMYTHE	Reference - Visit	Monthly Reference VIsit		Done	Calendar and Activities
	9/8/2001	TSMYTHE	Preparation	Run through responses w/ Cust Service	9/13/2001 09:18:46 PM		Calendar and Activities
	9/8/2001	TSMYTHE	To Do	Prepare for Customer meeting	9/14/2001 06:23:09 PM	Not Started	To Do and Activities
	9/8/2001	TSMYTHE	Email	Send out survey cards	9/10/2001 09:18:46 PM		Calendar and Activities
	9/12/2001	TSMYTHE	Reference - Call	Call to discuss deployment with BT		Done	Calendar and Activities
	9/8/2001	TSMYTHE	Call	Check up on progress vs. objectives	9/9/2001 09:18:46 PM		Calendar and Activities

All managers and employees must complete last quarter reviews and new quarterly objectives by Friday. Company meeting today at 2:00 p.m.

Figure 13. Example of a List

To navigate in a list, you use the vertical and horizontal scroll bars.

Topics in This Section

"About Vertical Scroll Bars in Lists" on page 31

"About Horizontal Scroll Bars in Lists" on page 31

"About Show More and Show Less Buttons in Lists" on page 32

Related Topic

"Displaying Record Count" on page 59

About Vertical Scroll Bars in Lists

Use vertical scroll bars to navigate between records in a list. Vertical scroll bars appear to the right of lists that contain more rows than can fit on the screen. Using the vertical scroll bar you can navigate to the next record, the next record set, the previous record, or the previous record set, depending on the button you click. Figure 14 shows an example of a vertical scroll bar. Table 6 describes the vertical scroll bar buttons.

NOTE: A scroll bar may appear if the number of records returned match the maximum records in a list. Once the system identifies that there are no more records, the scroll bar will be removed.

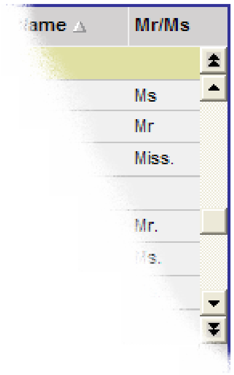


Figure 14. Example of Vertical Scroll Bar Buttons

Table 6. Description of Vertical Scroll Bar Buttons

Button	Description
⏫	Go to previous record set.
▲	Go to previous record.
▼	Go to next record.
⏬	Go to next record set.

About Horizontal Scroll Bars in Lists

Horizontal scroll bars appear at the bottom of lists that contain more columns than can fit on the screen. Use the horizontal scroll bar to move through all the columns currently being displayed.

Related Topic

"Organizing Columns in a List" on page 67

About Show More and Show Less Buttons in 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.

When a list is collapsed, you can click the show more button to expand it, as shown in Figure 15. When a list is expanded, you can click the show less button to collapse it, as shown in Figure 16.

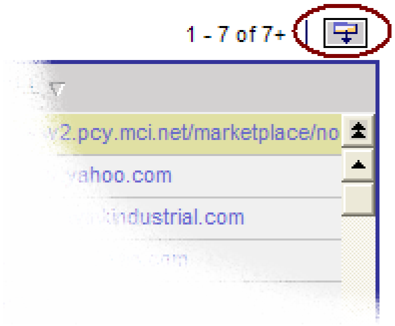

1 - 7 of 7+
v2.pcy.mci.net/marketplace/no
yahoo.com
industrial.com

Figure 15. Example of Show More Button in List

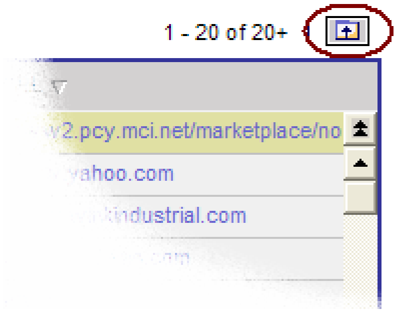
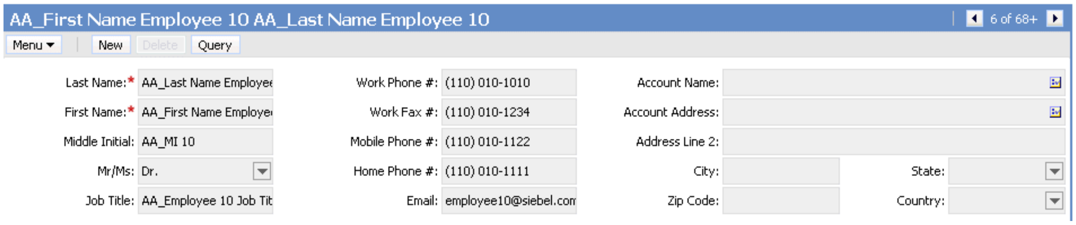

1 - 20 of 20+
v2.pcy.mci.net/marketplace/no
yahoo.com
industrial.com

Figure 16. Example of Show Less Button in List

About Forms in the User Interface

When you drill down on a record in a list, you see a form, as shown in Figure 17, that contains data for the record you selected. A form contains the data for one record.



Last Name:* AA_Last Name Employe
First Name:* AA_First Name Employe
Middle Initial: AA_MI 10
Mr/Ms: Dr.
Job Title: AA_Employee 10 Job Tit
Work Phone #: (110) 010-1010
Work Fax #: (110) 010-1234
Mobile Phone #: (110) 010-1122
Home Phone #: (110) 010-1111
Email: employee10@siebel.co

Figure 17. Example of a Form

If you have authorization to edit the information in a form, you can make edits directly in the form. Step off the record to save any edits you make. All required fields appear in the form and appear with an asterisk.

NOTE: In some cases, there is also a long form, which you can access by clicking the show more button. For examples of the show more and show less buttons, see "About Show More and Show Less Buttons in Lists" on page 32.

About Record Navigation Buttons in Forms

The record navigation buttons are located at the top right of each form. Use them to navigate between records. When you use the record navigation buttons in a form, you are navigating to the next record or the previous record.

About Charts in the User Interface

Sometimes data can be displayed in chart format. Charts are graphical representations of data and are available as views in some screens. Charts are used to compare data sets. Typically, you can access the chart by clicking the Charts hyperlink in the link bar below the screen tabs. An example of a chart is shown in Figure 18.

Use the drop-down list in the chart's title bar to determine which data is represented in the chart. This allows you to toggle between data sets. Most charts also include a drop-down list of chart types from which you can select the type of chart you want to see, for example a bar chart rather than a pie chart. You can use Ctrl + P to print a chart.

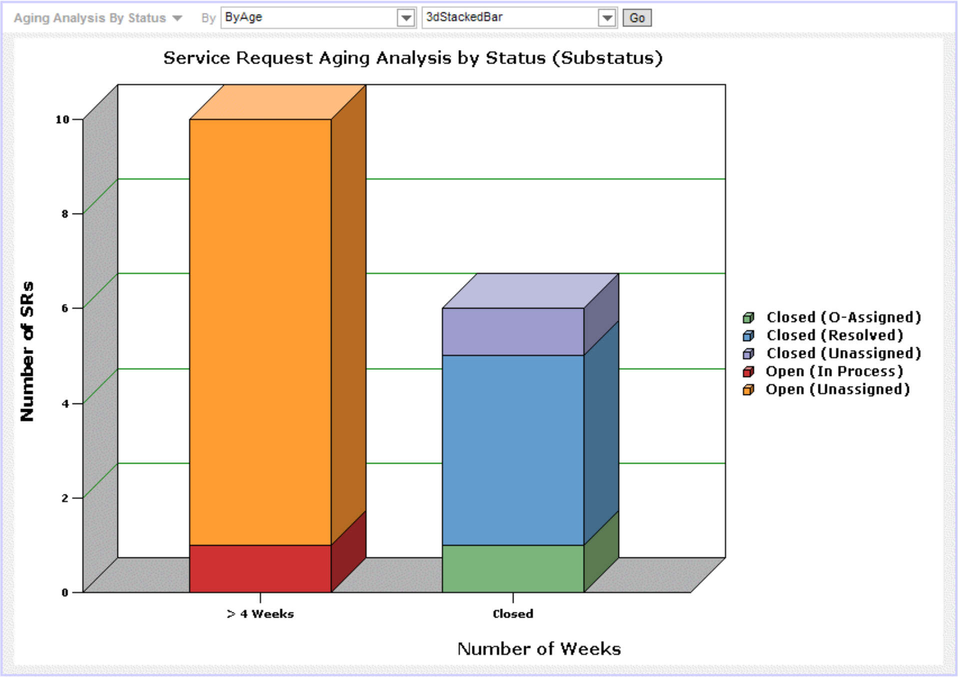


Figure 18. Example of a Chart

Saving Charts

You can save the charts in your Siebel application for use in other applications, for example, Microsoft PowerPoint.

To save a chart

1. Navigate to the chart you want to copy.
2. ALT + CTRL + Right-click on the chart and select Save Picture As.
3. In the Save Picture dialog box, save the chart as an image file:
    a. Leave the default file name as is or enter a new one in the File name field.
    b. Select an image type from the Save as type drop-down list.

    You now have a copy of the chart that you can include in presentations, documents, or other places you may want to display a chart.

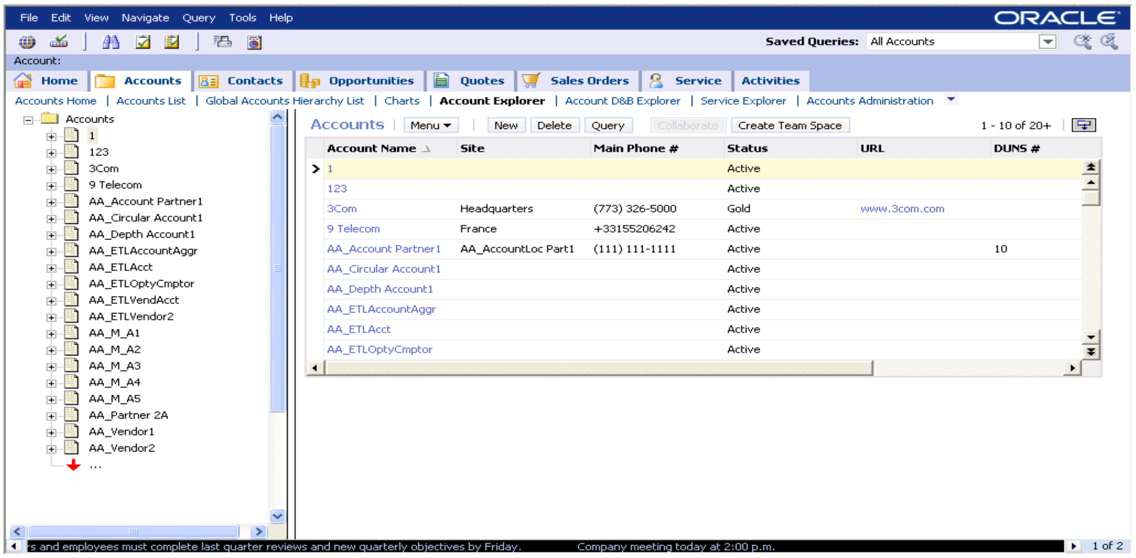
About Explorer Views in the User Interface

The explorer view is a way of displaying data in a compact hierarchical format. Typically, you can access the explorer view by clicking the Explorer hyperlink in the link bar below the screen tabs. Figure 19 shows an example of the explorer view.

The explorer view is an expandable tree view. The tree control is displayed in a frame on the left side of the content area. You select the control for the tree that you want to view, and the detail information for the selected tree element appears in the frame to the right.

Any folder in the tree preceded by a plus sign (+) contains other folders. Click the plus sign to expand the folder and reveal its contents. The list to the right always reflects the contents of the folder currently selected in the tree. Use the minus sign (-) to collapse the information back into the folder.

CAUTION: If you do not have access to a parent record, you will not be able to access any of that record's related child or grandchild records in the explorer view, even if you have access to the child or grandchild records.


File
Edit
View
Navigate
Query
Tools
Help
ORACLE
Saved Queries:
All Accounts
Account:
Home
Accounts
Contacts
Opportunities
Quotes
Sales Orders
Service
Activities
Accounts Home
Accounts List
Global Accounts Hierarchy List
Charts
Account Explorer
Account D&B Explorer
Service Explorer
Accounts Administration
Accounts
Menu
New
Delete
Query
Collaborate
Create Team Space
1 - 10 of 20+
1 of 2

Accounts
- 1
- 123
- 3Com
- 9 Telecom
- AA_Account Partner1
- AA_Circular Account1
- AA_Depth Account1
- AA_ETLAccountAggr
- AA_ETLAcct
- AA_ETLOptyCmptor
- AA_ETLVendAcct
- AA_ETLVendor2
- AA_M_A1
- AA_M_A2
- AA_M_A3
- AA_M_A4
- AA_M_A5
- AA_Partner 2A
- AA_Vendor1
- AA_Vendor2
- ...

Account Name	Site	Main Phone #	Status	URL	DUNS #
1			Active		
123			Active		
3Com	Headquarters	(773) 326-5000	Gold	www.3com.com	
9 Telecom	France	+33155206242	Active		
AA_Account Partner1	AA_AccountLoc Part1	(111) 111-1111	Active		10
AA_Circular Account1			Active		
AA_Depth Account1			Active		
AA_ETLAccountAggr			Active		
AA_ETLAcct			Active		
AA_ETLOptyCmptor			Active		

s and employees must complete last quarter reviews and new quarterly objectives by Friday.

Company meeting today at 2:00 p.m.

Figure 19. Example of Explorer View

About Common Buttons in Lists and Forms in the User Interface

The buttons described in Table 7 appear at the top of lists and forms. In addition to these buttons, your Siebel application may contain additional buttons or other elements on each list and form.

Table 7. Common Buttons in Lists and Forms

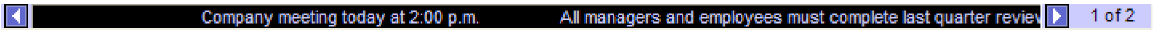
Button	Description
Menu	The menu button provides access to a menu of actions that apply to the active form, list, or explorer view, or a selected record in a list. Using the options in the menu, you can perform actions such as copy, edit, delete, and advanced sorting. **NOTE:** If you right-click in a form or a list you can access the same menu of actions provided by the menu button in that form or list.
New	Lets you create a new record. In a list, clicking this button inserts a new, empty row at the top of the list so you can create a new record. In a form, clicking this button displays a form with empty fields that you can fill in to create a new record.
Delete	Lets you delete the selected record.
Query	Lets you define and launch a query in a form or list. For more information about querying, see Chapter 9, "Using Query to Locate Information."

About the Message Bar in the User Interface

The message bar, located at the bottom of the Siebel application window, provides a way for administrators and managers to communicate information electronically to their direct reports and to others in the organization.

Broadcast messages appear as scrolling text across the bottom of the application window. The arrows at either end of the message bar control the direction in which the text scrolls. Messages can appear in different colors to indicate the importance of each message. Figure 20 shows an example of the message bar.

To fast-forward or reverse through messages, click and hold the arrow keys to the left and the right of the message bar. You can customize the behavior of the message bar in the Message Broadcasting tab in the User Preferences screen.



Company meeting today at 2:00 p.m.   All managers and employees must complete last quarter revie

Figure 20. Example of the Message Bar

Related Topic

"Customizing Aspects of the Message Bar" on page 150

4

About Records, Fields, and Field Controls

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

Topics in This Section

"About Records" on page 38

"About Fields" on page 38

"About Text Fields" on page 39

"About Field Controls" on page 39

"About Check Boxes" on page 40

"About Option Buttons" on page 40

"About Drop-Down Lists" on page 41

"About Field Control Buttons" on page 41

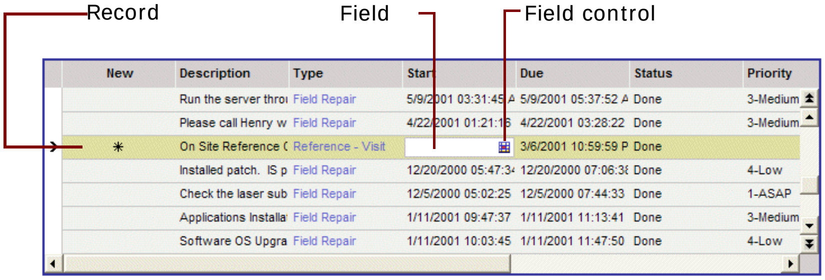
"About the Currency Calculator" on page 43

"About the Calendar Control" on page 44

About Records

A record is a group of related data organized into fields. For example, information about a contact, such as 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 be displayed individually in a form. Figure 21 shows an example of a record in a list.

In some situations, you cannot see every field that belongs to a record. To view every field in a record, you can drill down on the record in a list. You can also show more columns and then use the scroll bars to see the rest of the fields.



New	Description	Type	Start	Due	Status	Priority
	Run the server thro	Field Repair	5/9/2001 03:31:45 A	5/9/2001 05:37:52 A	Done	3-Medium
	Please call Henry w	Field Repair	4/22/2001 01:21:16	4/22/2001 03:28:22	Done	3-Medium
*	On Site Reference (	Reference - Visit		3/6/2001 10:59:59 P	Done	
	Installed patch. IS p	Field Repair	12/20/2000 05:47:3	12/20/2000 07:06:3	Done	4-Low
	Check the laser sub	Field Repair	12/5/2000 05:02:25	12/5/2000 07:44:33	Done	1-ASAP
	Applications Installa	Field Repair	1/11/2001 09:47:37	1/11/2001 11:13:41	Done	3-Medium
	Software OS Upgra	Field Repair	1/11/2001 10:03:45	1/11/2001 11:47:50	Done	4-Low

Figure 21. Example of a Record in a List

Related Topics

"About Horizontal Scroll Bars in Lists" on page 31

"Using Record Hyperlinks" on page 59

"Organizing Columns in a List" on page 67

About Fields

A field is a location in a record in which a particular type of data is stored. For example, a contact record may 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 your Siebel application required fields have an asterisk beside the field label. You cannot save a record until you have entered data in the required fields.

Read-Only Fields

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

Maximum Number of Characters

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

About Text Fields

A text field allows you to type text directly into the field. You can click in the field and begin typing. Figure 22 shows an example of a text field; Figure 23 shows an example of a text field with a text editor button.

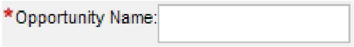


Figure 22. Example of a Text Field

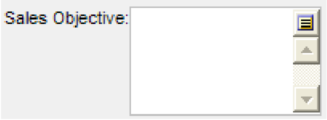
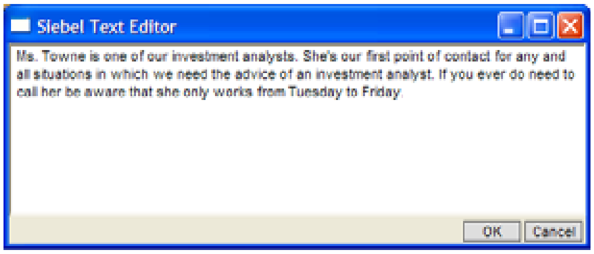


Figure 23. Example of a Text Field with a Text Editor Button

Using the Text Editor

You can launch a text editor from a text field in a list or form to create, edit, or view large amounts of text. This editor can be accessed by clicking the text editor button in the top right corner of the text field. In a list, this button appears only after the text field has been selected. Figure 24 shows an example of the Siebel Text Editor that appears when you click the text editor button.

When you click the text editor button in a read-only field, a text reader appears. In this case, you cannot make changes to the text.



Ms. Towne is one of our investment analysts. She's our first point of contact for any and all situations in which we need the advice of an investment analyst. If you ever do need to call her be aware that she only works from Tuesday to Friday.

Figure 24. Example of the Text Editor

About Field Controls

You can enter data into the 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. 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 control if one is available. In a list, the field control appears when you click in a field that includes one.

Related Topics

"About Check Boxes" on page 40

"About Option Buttons" on page 40

"About Drop-Down Lists" on page 41

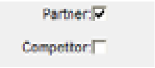
"About Field Control Buttons" on page 41

"About the Currency Calculator" on page 43

"About the Calendar Control" on page 44

About Check Boxes

Click the box next to (or below) an option to select or clear the check box. When you click an empty box, a check mark or an X appears in the box. If you click a box that is selected, the check mark or X disappears. Figure 25 shows an example of check boxes.



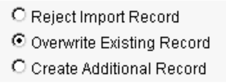
Partner: ☑

Competitor: ☐

Figure 25. Example of Check Boxes

About Option Buttons

Option buttons, also referred to as radio buttons, allow you to choose one of several options in a set. An option button appears as a circle, with a smaller, filled circle inside it when the option is selected. You cannot choose more than one option button in a set. Figure 26 shows an example of option buttons.



○ Reject Import Record

● Overwrite Existing Record

○ Create Additional Record

Figure 26. Example of Option Buttons

About Drop-Down Lists

A drop-down list allows you to click a down arrow button to the right of a field to select from a list of available values. Figure 27 shows an example of a drop-down list. You can also type the value or the starting letters of the value you are looking for in the drop-down field to automatically select it. After typing the value or starting letters of the value, tab or click off the field. The appropriate value appears in the field unless more than one value match the starting letters you entered. In this case, the drop-down list opens and you must select the appropriate value.

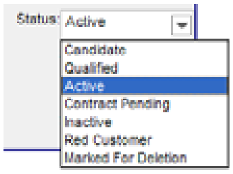

Status: Active

Figure 27. Example of a Drop-Down List

About Field Control Buttons

The field control buttons shown in Table 8 appear in many fields. You use field controls to work with records in your Siebel application.

Table 8. Description of Field Control Buttons

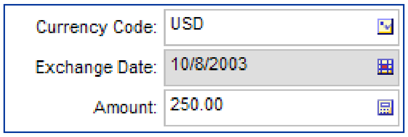
Button	Name	Description	Related Topic
🖩	Calculator button	Activates a currency calculator to assist you with calculating amounts.	"About the Currency Calculator" on page 43
📅	Calendar select button	Activates a calendar control for entering a date and optionally, time, in a date or date and time field. You can also type a date (or date and time) directly into a field. **NOTE:** Date fields only allow you to enter dates between January 1, 1753 to December 31, 4712. If you enter an incorrect value in a date field, you will receive an error. For example, if you enter 01/01/19999, you will receive an error.	"About the Calendar Control" on page 44

Table 8. Description of Field Control Buttons

Button	Name	Description	Related Topic
☰	Text editor button	Launches a text editor. You can launch a text editor from a text field in a list or form to create, edit, or view large amounts of text.	"About Text Fields" on page 39
▣	Single select button	Launches a single selection dialog box.	"Associating Records Using a Single Selection Dialog Box" on page 74
▣	Multiple select button	Launches a shuttle dialog box.	"Associating Records Using a Shuttle Dialog Box" on page 75

About the Currency Calculator

You access the currency calculator, shown in Figure 28, by clicking the calculator button that appears in currency or amount fields. You use the currency calculator to specify financial transaction information in foreign currencies. Table 9 describes each field control found in the currency calculator.



Currency Code: USD
Exchange Date: 10/8/2003
Amount: 250.00

Figure 28. Example of the Currency Calculator

Table 9. 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 pick the exchange date. For more information about the calendar control, see "About the Calendar Control" on page 44.
Amount	Calculator button	Type the amount in the field, or use the pop-up calculator, shown in Figure 29, to enter the amount.

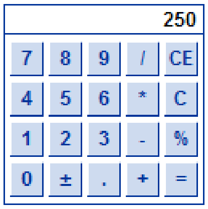
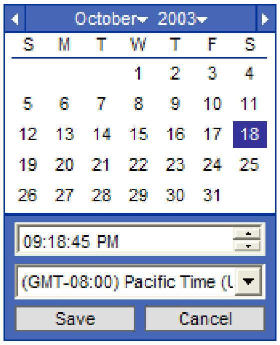


Figure 29. Example of Calculator

About the Calendar Control

You use the calendar control, shown in Figure 30, to select date and time information for a field. You access the calendar control by clicking the calendar select button in any date or time field. Table 10 describes each element of the calendar control.



09:18:45 PM

(GMT-08:00) Pacific Time (L

Figure 30. Example of the Calendar Control

Table 10. 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 in sequence. 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	Lets you define the time. You can use the spin control in the field to change the time, or you can type a value. This field appears only if you access the calendar control for a field that requires a time.
Time zone drop-down list	Lets you select a time zone. This field appears only if you access the calendar control for a field that requires a time.
Save button	Lets you save your selections. You can also click outside of the control to save your selections.
Cancel button	Lets you cancel your selections and leave the field blank or left with the values it contained before you accessed the calendar control.

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

5 Using the Site Map

The screen tabs that appear in the application window are determined by your organization and may be only a subset of the available screen tabs. To see a listing of all the screens available to you, use the Site Map.

To navigate to a screen using the Site Map

1. Do one of the following:
    - From the application-level menu, choose Navigate > Site Map.
    - Click the Site Map button on the application toolbar.
2. In the Site Map, click the hyperlink for the screen you want to navigate to.

    The Site Map displays the screen and all the views available in that screen.

    NOTE: If you select a screen or view from the Site Map that does not appear as a screen tab or a view tab in your application, a screen tab or view tab is created when you jump to that screen or view. It will only be visible for the current session.

3. Click the hyperlink to jump to the screen or view.

Related Topic

"About the Application Toolbar" on page 21

6

Using iHelp

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

Topics in This Section

"About iHelp" on page 48

"Using iHelp to Complete Tasks" on page 49

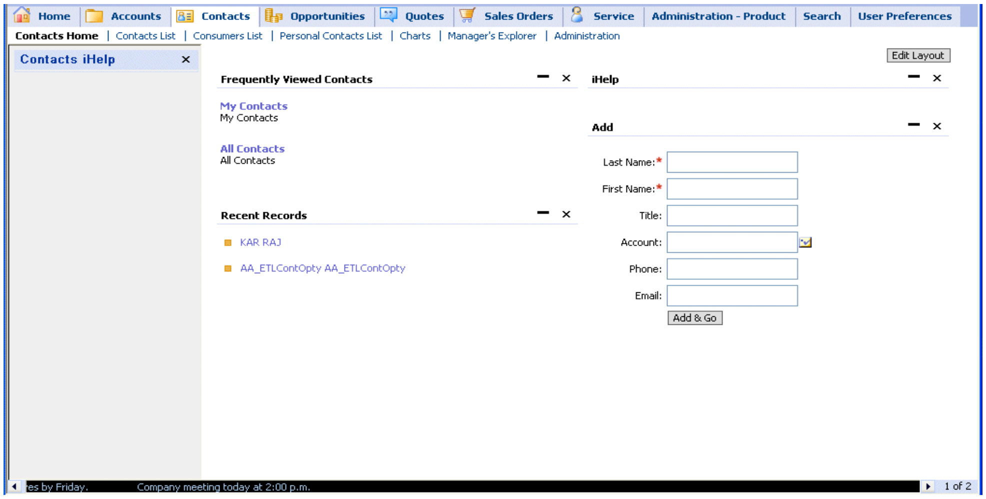
"Using the iHelp Map" on page 50

About iHelp

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

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

Figure 31 shows an example of the iHelp pane for the Contacts screen.


Home
Accounts
Contacts
Opportunities
Quotes
Sales Orders
Service
Administration - Product
Search
User Preferences
Contacts Home | Contacts List | Consumers List | Personal Contacts List | Charts | Manager's Explorer | Administration
Contacts iHelp
Edit Layout
Frequently Viewed Contacts
My Contacts
My Contacts
All Contacts
All Contacts
Recent Records
KAR RAJ
AA_ETLContOpty AA_ETLContOpty
iHelp
Add
Last Name:*
First Name:*
Title:
Account:
Phone:
Email:
Add & Go
1 of 2

es by Friday.   Company meeting today at 2:00 p.m.

Figure 31. Example of iHelp Pane

Using iHelp to Complete Tasks

You can launch iHelp to review the steps in a process 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 process.

To use iHelp

1. Do one of the following:
   - From the application-level menu, choose View > Action Pane > 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.

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

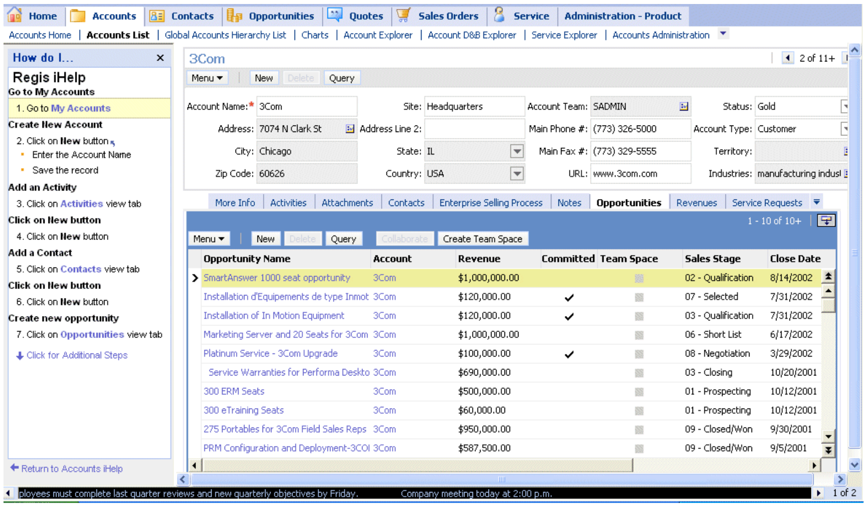
   Figure 32 shows an example of an expanded iHelp item.

3. Follow the instructions provided in the iHelp pane.

   The following table provides some additional information.

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, a column header in a list, or a field in a form to help you complete a task.
↙	Expand the description of a step to show its details. In some cases the details may contain substeps.
↖	Collapse the description.
Return to...	Return to the top-level list of iHelp items.
Click for Additional Steps	Access additional steps that are available based on certain conditions being met. If this link appears in the iHelp pane, you must complete each step in sequence before you can access the additional steps. If you do not complete each step, an error message appears.

An example of an expanded iHelp item is shown in Figure 32.


Home
Accounts
Contacts
Opportunities
Quotes
Sales Orders
Service
Administration - Product
Accounts Home | Accounts List | Global Accounts Hierarchy List | Charts | Account Explorer | Account D&B Explorer | Service Explorer | Accounts Administration
How do I...
×
3Com
2 of 11+
Menu
New
Delete
Query
More Info
Activities
Attachments
Contacts
Enterprise Selling Process
Notes
Opportunities
Revenues
Service Requests
1 - 10 of 10+
Menu
New
Delete
Query
Collaborate
Create Team Space
Return to Accounts iHelp
1 of 2

Regis iHelp

Go to My Accounts

1. Go to **My Accounts**

Create New Account

2. Click on **New** button
   - Enter the Account Name
   - Save the record

Add an Activity

3. Click on **Activities** view tab

Click on New button

4. Click on **New** button

Add a Contact

5. Click on **Contacts** view tab

Click on New button

6. Click on **New** button

Create new opportunity

7. Click on **Opportunities** view tab

Click for Additional Steps

Account Name:* 3Com
Site: Headquarters
Account Team: SADMIN
Status: Gold
Address: 7074 N Clark St
Address Line 2:
Main Phone #: (773) 326-5000
Account Type: Customer
City: Chicago
State: IL
Main Fax #: (773) 329-5555
Territory:
Zip Code: 60626
Country: USA
URL: www.3com.com
Industries: manufacturing indusl

Opportunity Name	Account	Revenue	Committed	Team Space	Sales Stage	Close Date
SmartAnswer 1000 seat opportunity	3Com	$1,000,000.00		☐	02 - Qualification	8/14/2002
Installation d'Equipements de type Inmot	3Com	$120,000.00	✓	☐	07 - Selected	7/31/2002
Installation of In Motion Equipment	3Com	$120,000.00	✓	☐	03 - Qualification	7/31/2002
Marketing Server and 20 Seats for 3Com	3Com	$1,000,000.00		☐	06 - Short List	6/17/2002
Platinum Service - 3Com Upgrade	3Com	$100,000.00	✓	☐	08 - Negotiation	3/29/2002
Service Warranties for Performa Deskto	3Com	$690,000.00		☐	03 - Closing	10/20/2001
300 ERM Seats	3Com	$500,000.00		☐	01 - Prospecting	10/12/2001
300 eTraining Seats	3Com	$60,000.00		☐	01 - Prospecting	10/12/2001
275 Portables for 3Com Field Sales Reps	3Com	$950,000.00		☐	09 - Closed/Won	9/30/2001
PRM Configuration and Deployment-3COI	3Com	$587,500.00		☐	09 - Closed/Won	9/5/2001

ployees must complete last quarter reviews and new quarterly objectives by Friday. Company meeting today at 2:00 p.m.

Figure 32. Example of Expanded iHelp Item

To close the iHelp pane

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

Related Topic

"About the Application Toolbar" on page 21

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 > Go to iHelp Map.
   - Choose Navigate > Site Map > iHelp Map > iHelp Map.

   The iHelp Map screen appears.
2. To launch an iHelp item, click the iHelp item name.

7 Common Record Tasks

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

Topics in This Section

"Creating Records" on page 52
"Using Quick Fill to Create Records" on page 53
"Copying Records" on page 54
"Editing Records" on page 54
"Changing Multiple Records" on page 55
"Saving Data" on page 55
"Canceling Changes" on page 56
"Deleting Records" on page 56
"Printing Records" on page 58
"Using Record Hyperlinks" on page 59
"Displaying Record Count" on page 59
"Finding Information About Records" on page 60
"Identifying New Records" on page 62
"Flagging Records" on page 62
"Adding Notes to Records" on page 62
"Merging Duplicate Records" on page 63
"Spell Checking Fields" on page 64
"Attaching Files to Records" on page 65
"Attaching URLs to Records" on page 67
"Organizing Columns in a List" on page 67
"Sorting Records in a List" on page 69
"Freezing Columns in a List" on page 71
"Resizing Columns" on page 72

Creating Records

You can create records throughout 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 that you need to complete. The procedures in this section show how to create records using some of the commands available throughout the application. You can use whichever method works best for you, or whichever method is available.

Some records contain read-only fields. Read-only fields are those in which you cannot enter data. You may not have user privileges that allow you to enter data in the read-only field, or the data may be automatically filled in by the system.

NOTE: Not all users can create new records. Your ability to do so depends on the responsibilities given to you by your administrator.

To create a record using the New button

1. In the list or form, click New.

   A new record appears.

2. Enter the appropriate data and save the record.

To create a record using the menu button

1. In the list or form, click the menu button, and then click New Record.

   A new record appears.

2. Enter the appropriate data and save the record.

To create a record using the application-level menu

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

   A new record appears.

2. Enter the appropriate data and save the record.

Related Topics

"Associating Records Using a Single Selection Dialog Box" on page 74

"Associating Records Using a Shuttle Dialog Box" on page 75

"Copying Records" on page 54

"Using Keyboard Shortcuts" on page 161

Using Quick Fill to Create Records

You can use templates to store default values for fields so that you can use those default values when you create new records. These templates are referred to as quick fill templates. They fill in fields in a form.

Your administrator can set these templates up for your organization, but you can also create your own.

For example, if you are a service representative, you could create different quick fill templates containing the values for common types of service requests that you have to log. Then, when a call for a new request that is one of these types comes in, you can simply apply the template to create a new record with all these default values.

While users can save values for read/write fields, single-value and multi-value fields which 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, that value will not saved with the template.

Once you have created a set of templates, you may want to delete the ones you no longer use, or rename some of the templates. To do this, you use the User Preferences screen. For more information, see "Maintaining Quick Fill Templates" on page 157.

To create a new quick fill template

1. Create a new record and complete all the fields for which you want to define default values.
2. In the form, click the menu button, and then click Save as Template.

   The Save Template As dialog box appears.

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

   If a template with the same name already exists, a message appears that you cannot save the template with that name. In this case, 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.

To use a quick fill template to create a record

1. In a form, click the menu button, and then click New From Template.

   The Pick Template dialog box appears.

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

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

To use the last used quick fill template to create a record

- In a form, click the menu button, and then click New From Last Template.

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

To apply a quick fill template to a new record

1. In a form, click the menu button, and then click New Record.
2. In the empty form, click the menu button, and then click Apply Template.

   The Pick Template dialog box appears.

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

   The values defined in the quick fill template are completed 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, it may be more efficient to copy the existing record and then modify the copy.

To copy a record

1. Find and select the record you want to copy.
2. Click the menu button, and then click Copy Record.

   A new record with the copied information appears.

3. Make your changes and step off the record to save your changes.

Editing Records

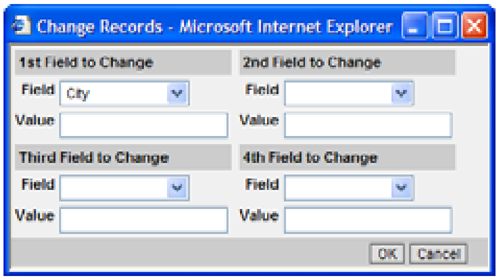
To edit a record, you must have appropriate access privileges.

To edit a record

1. Find and select the record you want to change.
2. Make your changes and step off the record to save your changes.

Changing Multiple Records

You may need to modify the same data in a number of records. Instead of repeatedly changing the same information in each record, you can make the same change in several records at once using the Change Records dialog box shown in Figure 33.


Change Records - Microsoft Internet Explorer
1st Field to Change
2nd Field to Change
Value
Value
Third Field to Change
4th Field to Change
Field
Value
Field
Value
OK
Cancel

Field City

Figure 33. Example of Change Records Dialog Box

To change multiple records

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

   The Change Records dialog box appears. You may change up to four fields at one time.

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 Step 4 and Step 5 until you have entered all of the information you want to substitute in your chosen fields.

6. Click OK to apply the changes.

Saving Data

You can save data in several ways.

CAUTION: If you try to edit a record at the same time as another user, you will see a warning message, and you will be unable to make any changes until the other user exits the record.

To save data

- Do one of the following:
  - When you are finished editing or adding a record in a form or a list, step off the record to commit the changes to the database.

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

- Click the menu button, and then click Save Record.
- From the application-level menu, choose Edit > Save Record.

NOTE: When you are finished editing or adding a record in a form, you can also click Enter to commit the changes to the database. However, this is not the recommended way to save data.

Canceling Changes

You may find that you need to cancel edits you have made to a record before you save it. You can undo your edits to a record only if you have not saved it yet.

To cancel edits in form or a list

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

NOTE: You cannot undo changes or additions that you make to selection dialog boxes. For example, when you add or remove employees from a selection dialog box, you cannot undo these changes.

Deleting Records

You can delete a record by using the Delete button, the menu button in a list or form, the application-level menu, or the appropriate keyboard shortcut. For more information about keyboard shortcuts, see Chapter 17, “Using Keyboard Shortcuts.”

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

NOTE: When a parent record is deleted, explicitly or 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.

To delete a record using the Delete button

1. Select the record you want to delete.

   In a list, the selected record is highlighted, and a blue border appears around the list or the form that contains the selected record.

2. Click Delete.

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

3. Click OK to delete the record.

To delete a record using the menu button

1. Select the record you want to delete.

   In a list, the selected record is highlighted, and a blue border appears around the list or the form that contains the selected record.

2. Click the menu button, and then click Delete Record.

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

3. Click OK to delete the record.

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, and a blue border appears around the list or the form that contains the selected record.

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

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

3. Click OK to delete the record.

Associating Records

When you are working with records, you need access to all information that is related to those records. You can associate a record with another record. For example, if you are working with an account, you are likely to track key contacts for that account. The Contacts screen allows you to add and manage key contacts. You can also find a Contacts view in many screens, such as in the Accounts screen. Through the Contacts view, you can associate a contact with a particular account record.

NOTE: You might not be able to associate records with other records in all screens if there is no association between the records.

To associate a record with another record

1. Navigate to the appropriate screen.
2. Drill down on the record with which you want to associate another record.
3. Click the appropriate view tab.

   The selected view appears.

4. In the selected view, click New.

   Depending on which view you are in, a blank record or a selection dialog box appears.

5. Do one of the following:

   - Select the record that you want to associate from the dialog box, and click OK to add a new record.

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

Related Topics

"Creating Records" on page 52

"Associating Records Using a Single Selection Dialog Box" on page 74

"Associating Records Using a Shuttle Dialog Box" on page 75

"Finding Records in a Selection Dialog Box" on page 76

Printing Records

There are a number of ways to print records in the Siebel application.

Running a report. You can print records by running a report and then printing the report. For more information about reports, see "Running Reports" on page 102.

Web browser print. You can use the Web browser's print function to print an image of the current screen. However, the options you select when using this function and the fields visible in the Web browser will affect the printed page or pages, which may or may not contain all the information in the screen.

Quick Print button. You can use the quick print functionality that works through the Web browser's print function or through integration with Microsoft Excel. To use Microsoft Excel as your quick print application you must do the following:

1. Change a security setting in your Web browser. See "Changing Browser Security Levels" on page 16 for details.
2. Identify Microsoft Excel as your quick print application in user preferences. See "Setting Quick Print Options" on page 143 for details.

NOTE: Choosing Microsoft Excel as your quick print application limits you to printing lists; Web browser print (HTML) allows you to print both lists and forms.

To print records using quick print

1. Navigate to the list that contains the records you want to print.
2. From the application-level menu, choose File > Print.

   The Print Custom dialog box appears.
3. Use the Rows To Print and Columns To Print option buttons to define which rows and columns you want to print.
4. Do one of the following:
   - If you enabled integration with Microsoft Excel, click Print.

- If the Print button is disabled, you have not enabled integration with Microsoft Excel. In this case, click Print Preview to see the output in a separate Web browser window. You can then use the Web browser's print function to send the output to your printer.

NOTE: To bypass the Print Custom dialog box and have the Siebel application use the print settings specified in your user preferences, click the Quick Print button on the Siebel application toolbar instead of selecting File > Print from the application-level menu. For more information about setting up quick print options in the User Preferences screen, see "Setting Quick Print Options" on page 143. Your selections in the Custom Print dialog box apply only to your current user session. They do not change your user preferences settings.

Using Record Hyperlinks

Hyperlinks appear in a record that is in a list. They usually consist of blue text that becomes underlined when you move your cursor over the hyperlink. A 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 is shown as a hyperlink. This hyperlink allows you to link directly to the account profile in the Accounts screen.

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

Clicking a hyperlink that accesses information that is related to the current record but is outside the current screen is called *drilling across*.

When you drill across screens using record hyperlinks, you will remain in the same thread. This means you may find yourself in a new screen and view, but you will not see all of the records available in that screen and view. If you want to see every record in the new screen, you must click the current screen tab.

TIP: You can use the thread bar to navigate back to the original record after drilling across. However, if you navigate to another screen using a screen tab or the Site Map, the thread bar resets.

Related Topics

"About the Thread Bar in the User Interface" on page 23

"Using the Site Map" on page 45

Displaying Record Count

You can get an accurate count of the number of records in a list without having to navigate to the last record in that list. If you execute a query, this function will show you the total number of matching records in the query.

To display record count

1. (Optional) Execute a query.

2. Click the menu button, and then click Record Count.

   The Record Count dialog box appears.

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

Finding Information About Records

Use the About Record feature to access system information about a record, such as when it was last edited. An example of the About Record dialog box is shown in Figure 34.

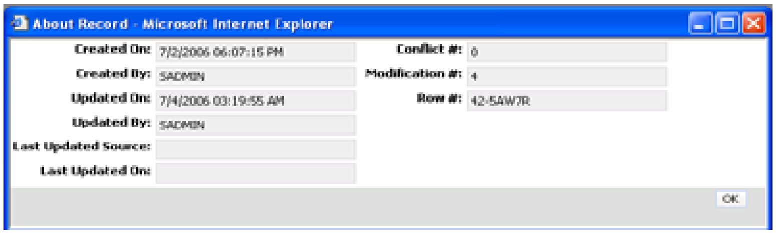
To find information about a record

1. Navigate to and select the record.

2 Click the menu button, and then click About Record.

The About Record dialog box, shown in Figure 34, appears. Some fields are described in the following table.

Field	Description
Last Updated	Indicates the last update time for the record.
Last Updated Source	Indicates the identity of the component. Useful for debugging issues where multiple components may have changed the data.
Last Updated On	Indicates the date and time when the physical data changed in the database and provides a consistent timestamp usage across all components for each record. **NOTE:** For remote users, the Last Updated date and Last Updated On dates might be different between the server database and the extracted database.
Conflict #	Used by Siebel Remote to prevent duplication of records. For more information see *Siebel Remote and Replication Manager Administration Guide*.
Modification #	This number is incremented every 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 record AA with modification number 3, and user A updates the record, the modification number changes to 4. If user B then tries to update the record, the system will notice that the modification number of user B's record (3) is old, and user B's update will be rejected. User B will not be able to update the record until it is refreshed with user A's changes.



Created On: 7/2/2006 06:07:15 PM
Created By: SADMIN
Updated On: 7/4/2006 03:19:55 AM
Updated By: SADMIN
Last Updated Source:
Last Updated On:
Conflict #: 0
Modification #: 4
Row #: 42-5AW7R

Figure 34. Example of About Record Dialog Box

About Accessing the About Record Dialog Box After a Merge

If you access the About Record dialog box after merging records, 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 was merged into the existing record.

Identifying New Records

If you are a member of a team that shares information, it is important for you to see any new records that have been added to that shared information. You can see a record automatically if you have access rights to view that record.

To identify a new record

- When you are working within a list, look for an asterisk in the New column.

  If a record has been newly added to your system, an asterisk appears in the New field in that record. After you drill down on a new record, the asterisk no longer appears in the New column.

  NOTE: The New asterisk is specific to the primary employee. If you are not the primary employee for this position, the New asterisk will not clear after you drill down. For more information about positions, see "About Access and Responsibilities in the Siebel Application" on page 15.

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 is visible only to you.

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.

   This places a flag in the record that you can query on and view in a list.

   If you cannot see a Priority Flag column, check your Columns Displayed settings. The Priority Flag column is not available in all views. For information about showing and hiding columns, see "Organizing Columns in a List" on page 67.

Adding Notes to Records

When you are working with records, you will often find that you need to make notes. You can add a note to a record in the Notes view.

In the Notes view, you can enter public notes or private notes. Use the link bar in the Notes view to switch between public and private notes. A public note can be seen by anyone who has access to the record. A private note can be seen only by the person who enters the note.

The Notes view is not available in all screens. It appears only where it would be logical to keep notes for individual records, for instance in the Accounts, Contacts, and Opportunities screens.

To add a note to a record

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

   A blank record appears.
4. From the Type drop-down list, choose Note.
5. In the Description field, type the note.
6. Use the Check Spelling button to make sure your note has no spelling errors.

Related Topic

"Spell Checking Fields" on page 64

Merging Duplicate Records

You may sometimes find that two or more records contain the same information and that to keep the database accurate, the records must be merged into one. The Merge Records command allows you to merge a number of records into one.

If other records are associated with the records you merge, those records, with the exception of duplicates, 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 designated as the primary person. Depending on your access privileges and your configuration, the merge functionality might not be available to you.

CAUTION: When merging records you must decide which record will survive, and which record will be the source record. Source record field values will not exist after you merge records. Only values in the surviving record's fields will remain after merging records. For example, if you are merging two contact records, and the source record contains a value in the Job Title field, but the surviving record does not, after the merge there will be no value in the Job Title field. The source record field value for Job Title is overwritten by the value in the Job Title field in the surviving record, even when the value is NULL.

To merge two records

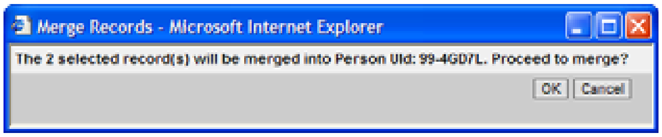
1. For each record being merged, select the record, click the menu button, and then click About Record to record the Row #.
2. Click the record that will be the source record.

3. Press and hold down the CTRL key and click the record that will survive.

   The source record will be merged *into* the surviving record.

4. From the application-level menu, choose Edit > Merge Records.

   A dialog box appears, displaying the Row # of the surviving record. Use the numbers you recorded before the merge to make sure the correct record survives.

   The 2 selected record(s) will be merged into Person UId: 99-4GD7L. Proceed to merge?

   NOTE: If the Merge Records command is unavailable, the feature is not supported for the record types you have selected.

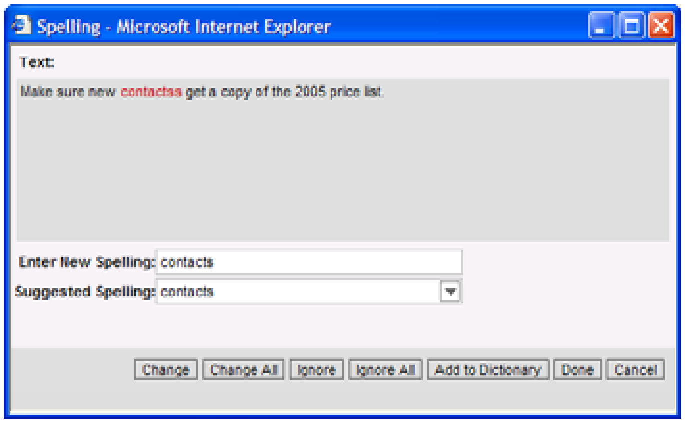
5. Click OK to complete the merge.

   The records are merged into a single record that bears the name of the record you designated as the surviving record, and includes the data from the surviving record.

Spell Checking Fields

You can perform a spell check from a number of places in your Siebel application. Sometimes there is a spell check button, and at other times you can access the spell check function from the menu button. Some areas where spell check is available include the Notes view, the Service Request form, email messages, faxes, pages, and wireless messages. In Notes views and Service Request forms, the spell check will check the proper spelling of text in Description and Summary fields. For the spell check to work properly when you invoke it from the menu button, you must first step off the record to save the record before running the spell check. Figure 35 shows an example of the Spelling dialog box.

You can also set up your preferences so that all the email messages, faxes, pages, or wireless messages you send from your Siebel application are automatically checked for spelling errors before they are sent to a recipient.



Text:

Make sure new contactss get a copy of the 2005 price list.

Enter New Spelling: contacts

Suggested Spelling: contacts

Figure 35. Example of Spelling Dialog Box

Related Topic

"Changing Default Spell Check Options" on page 149

Attaching Files to Records

You can attach a file created in another application to a record wherever the Attachments view is available within a screen. A variety of file types, such as Microsoft Outlook email messages, Microsoft Word documents, or image files, can be attached. The Attachments view is available only in those screens that would logically benefit from the addition of supporting material. For example, there are Attachments views in the Contacts, Accounts, and Opportunities screens.

The major benefit of the Attachments view is that it allows others who may be working with the same record to access the attachment. This provides team members with the latest information.

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

You can create an attachment by:

- Using the Attachments view's New File button.
- Using the Attachments view's menu button.
- Dragging a file into the Attachments list view.

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

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

2 Click the Attachments view tab.

The Attachments list appears.

3 Click New File.

The Choose file dialog box appears.

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

The Choose file dialog box closes and the file appears in the Attachments list as a new attachment record with the appropriate fields filled in. Some fields are described in the following table:

Field	Description
Update File	A check mark in this field indicates that you want your copy of the file to be updated automatically each time the original file is updated.
Download File	Allows you to request files from the server. When a check mark appears in this field, the document is retrieved during the next synchronization session. This field applies to you only if you use Siebel Remote.

To attach a file to a record using the menu button

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

2 Click the Attachments view tab.

The Attachments list appears.

3 Click the menu button, and then click New Record.

A blank record appears.

4 Click the Attachment Name select button.

The Add Attachment dialog box appears.

5 Click Browse.

The Choose file dialog box appears.

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

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

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

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

2 Click the Attachments view tab.

The Attachments list appears.

3 Locate and select the file you want to attach to this record.

4. Drag the file to the Attachments list view.

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

NOTE: When you try to open an attached file, you will get either a Siebel download dialog box, or an Internet Explorer download dialog box. This depends on whether or not the record to which the attached file belongs is read-only or not. If the record is read-only, the Internet Explorer dialog box appears. If the record is not read-only, the Siebel dialog box appears.

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.

To attach a URL to a record

1. Drill down on the record to which you want to attach the URL.
2. Click the Attachments view tab.

   The Attachments list appears.

3. Click New URL.

   The Add URL dialog box appears.

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

   The URL appears as a hyperlink in the Attachments list. You can click it to access the corresponding Web site.

   NOTE: If you cannot access the Web site after adding it as an attachment, it may be because you are not connected to the network.

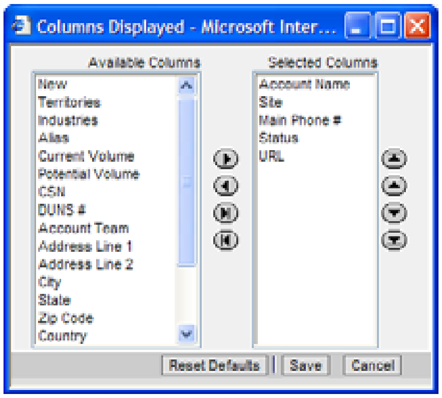
Organizing Columns in a List

A list consists of many columns of data, some of which may not be displayed on the screen. You can add, remove, and rearrange the columns to suit your preferences.

To organize columns in a list

1. In a list, click the menu button, and then click Columns Displayed.

   The Columns Displayed dialog box appears.


Columns Displayed - Microsoft Inter...
Available Columns
New
Territories
Industries
Alias
Current Volume
Potential Volume
CSN
DUNS #
Account Team
Address Line 1
Address Line 2
City
State
Zip Code
Country
Selected Columns
Account Name
Site
Main Phone #
Status
URL
Reset Defaults
Save
Cancel

2. Select one or more columns in one of the lists (Available Columns or Selected Columns).
3. Use the buttons between the Available Columns list and the Selected Columns list to show or hide the selected columns.

   The following table describes each button.

Button	Description
▶	Shows the selected columns.
◀	Hides the selected columns.
▶|	Shows all columns.
|◀	Hides all columns.

4. Select a column in the Selected Columns list and use 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 following table describes each button.

Button	Description
▼	Moves a selected column down one position in the Selected Columns list. This moves the column to the right in the list you are modifying.
▲	Moves a selected column up one position in the Selected Columns list. This moves the column to the left in the list you are modifying.

Button	Description
⤓	Moves a selected column to the bottom of the Selected Columns list. This moves the column all the way to the right in the list you are modifying.
⤒	Moves a selected column to the top of the Selected Columns list. This moves the column all the way to the left in the list you are modifying.

5 Click Save.

Sorting Records in a List

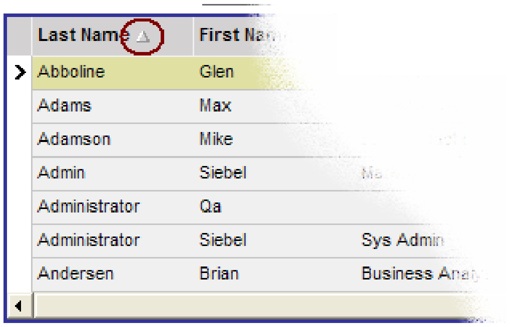
You can sort records in a list using the values in one or more columns. For example, accounts can be sorted to appear alphabetically by name (by sorting on the Name column).

In addition, an advanced sort allows you 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.

Not all columns in a list are sortable. If (Sortable) appears in the tooltip when you position your cursor in the header of a column, then that column is sortable.

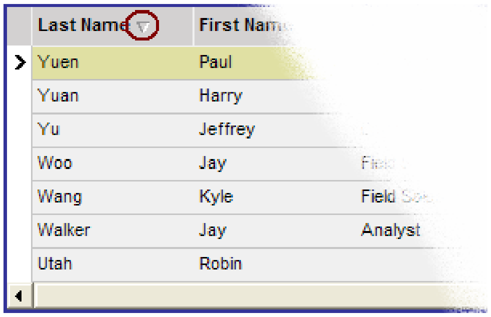
CAUTION: If you used any special characters in a field, such as parentheses, you may encounter problems when you try to sort records.

The active sort order of a column is shown in the column header: a full triangle pointing up, as shown in Figure 36, means the data is sorted in ascending order on the values in the column; a hollow triangle pointing down, as shown in Figure 37, means the data is sorted in descending order on the values in the column.



Last Name △	First Na	
Abboline	Glen	
Adams	Max	
Adamson	Mike	
Admin	Siebel	Ma
Administrator	Qa	
Administrator	Siebel	Sys Admin
Andersen	Brian	Business Ana

Figure 36. Example of Column Sorted in Ascending Sort Order



Last Name ▽	First Nam	
Yuen	Paul	
Yuan	Harry	
Yu	Jeffrey	
Woo	Jay	Fie
Wang	Kyle	Field Se
Walker	Jay	Analyst
Utah	Robin	

Figure 37. Example of Column Sorted in Descending Sort Order

To sort on a single column in ascending order

- In a list, click the column header of the column by which you want to sort.

To sort on a single column in descending order

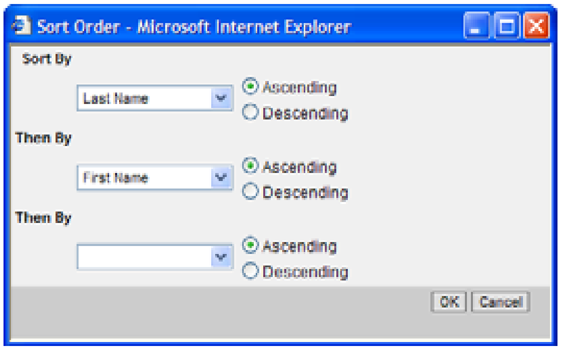
1. Sort on the column in ascending order by clicking the column header of the column.
2. Click the column header again.

   NOTE: The sort order is reset when you leave the screen, unless you save it as part of a query. This option is only available for *My* views. For more information on querying, see Chapter 9, “Using Query to Locate Information.”

To perform an advanced sort

1. In a list, click the menu button, and then click Advanced Sort.

   The Sort Order dialog box appears.



Sort Order - Microsoft Internet Explorer

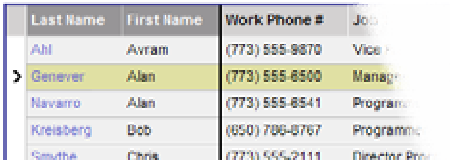
Sort By
Last Name ● Ascending ○ Descending
Then By
First Name ● Ascending ○ Descending
Then By
● Ascending ○ Descending

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

   The columns are sorted in the order you specified; the sort order arrow appears in the column header of the first column you selected for the advanced sort.

Freezing Columns in a List

Lists can contain many columns. You may find that you want to scroll to the right and view columns you cannot see without losing focus of the left-most columns. You can do this by freezing the desired left-most columns. An example of a list with frozen columns is shown in Figure 38.



	Last Name	First Name	Work Phone #	Jo
	Ahl	Avram	(773) 555-9870	Vice
>	Genever	Alan	(773) 555-6500	Manag
	Navarro	Alan	(773) 555-6541	Progra
	Kreisberg	Bob	(650) 786-8767	Programm
	Smythe	Chris	(773) 555-2111	Director Pro

Figure 38. Example of Columns Frozen in a List

To freeze columns in a list

1. Select the list in which you want to freeze columns.
2. Double-click the column header of the right-most column you want to freeze.

   The frozen column headers now appear with a darker gray background. In addition, a dark gray vertical line appears separating the frozen columns from the unfrozen columns.

3 Scroll to the right to view columns without losing focus of the frozen columns on the left.

To unfreeze columns

- Double-click the header of the right-most frozen column.

  This is the same column you double-clicked to freeze the columns.

Resizing Columns

You may find that you need to alter the width of a column to better view data. You can also save a changed column size so you do not have to resize a column repeatedly.

To resize columns

1. Place the cursor over the column header divider.

   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.

8 Using Selection Dialog Boxes

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

Topics in This Section

"Launching Selection Dialog Boxes" on page 74

"Associating Records Using a Single Selection Dialog Box" on page 74

"Associating Records Using a Shuttle Dialog Box" on page 75

"Finding Records in a Selection Dialog Box" on page 76

"Querying for Records in a Selection Dialog Box" on page 77

Launching Selection Dialog Boxes

There are two buttons, shown in Table 11, that launch selection dialog boxes: the single select button and the multiple select button.

Table 11. Description of Select Buttons

Button	Name	Description
☑	Single select button	Launches a single selection dialog box.
☑	Multiple select button	Launches a shuttle dialog box.

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

Shuttle dialog boxes. Shuttle dialog boxes allow you to select a number of records and add them to a field. An example of a shuttle dialog box is shown in Figure 39 on page 75.

NOTE: To select records in selection dialog boxes you can double-click, press ENTER, or click OK.

Associating Records Using a Single Selection Dialog Box

Depending on where you are in the Siebel application, you can associate an existing record or a new record in a single selection dialog box.

To associate an existing record using 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.
5. Click OK.

To associate a new record using a single selection dialog box

1. Navigate to the appropriate screen.
2. Select the record with which you want to associate a new record.
3. Click the single select button in the appropriate field.

   A single selection dialog box appears.

4 Click New.

5 In the blank row that is inserted in the dialog box, enter the new record's information.

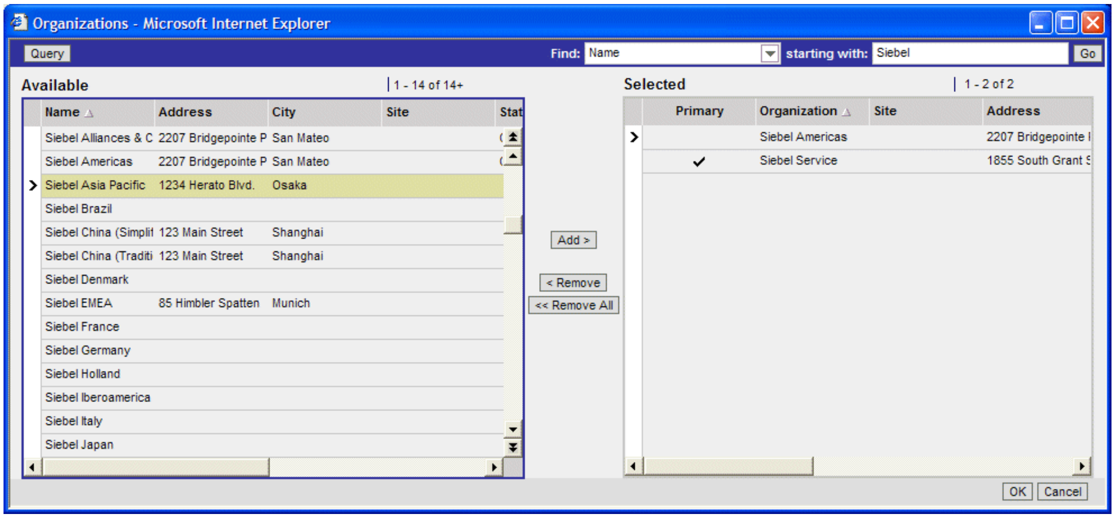
6 Click OK.

NOTE: There are some situations in which you cannot add new records to single selection dialog boxes.

Associating Records Using a Shuttle Dialog Box

Shuttle dialog boxes allow you to associate many records with one record. An example of a shuttle dialog box is shown in Figure 39. Depending on where you are in the Siebel application, you may be able to add new records from the shuttle dialog box.

NOTE: If you attempt to add data to the database through a dialog box and then decide to cancel the record you are adding, the data you added in the dialog box will *not* be deleted from the database. However, if the data does not exist anywhere else in the application except in the record in which the dialog box was opened, it will be deleted.



Find: Name starting with: Siebel

Available 1 - 14 of 14+

	Name	Address	City	Site	Stat
	Siebel Alliances & C	2207 Bridgepointe P	San Mateo		(
	Siebel Americas	2207 Bridgepointe P	San Mateo		(
>	Siebel Asia Pacific	1234 Herato Blvd.	Osaka		
	Siebel Brazil				
	Siebel China (Simplit	123 Main Street	Shanghai		
	Siebel China (Traditi	123 Main Street	Shanghai		
	Siebel Denmark				
	Siebel EMEA	85 Himbler Spatten	Munich		
	Siebel France				
	Siebel Germany				
	Siebel Holland				
	Siebel Iberoamerica				
	Siebel Italy				
	Siebel Japan				

Selected 1 - 2 of 2

	Primary	Organization	Site	Address
>		Siebel Americas		2207 Bridgepointe I
	✓	Siebel Service		1855 South Grant S

Figure 39. Example of Shuttle Dialog Box

To associate an existing record using a shuttle 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 shuttle dialog box appears.

4. In the Available list of records, select the record you want to associate with the current record.

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

5. Click Add >.

   The record is moved from the Available list to the Selected list.

6. Click OK.

To associate a new record using a shuttle 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 shuttle dialog box appears.

4. Click New.
5. In the blank form that appears, enter the new record’s information and click Save to return to the shuttle dialog box.

   The record you created now appears in the Selected list of records in the shuttle dialog box.

6. Click OK.

Finding Records in a Selection Dialog Box

A selection dialog box can contain many records. You may find it necessary to search for the information you need. Use the Find drop-down list and the Starting with field for full or partial-text searches on one column.

The Siebel application automatically assumes a wildcard exists at the end of text entered in the Starting with field. This means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe.*

CAUTION: Any spaces you enter in the Starting with field when performing a find will be searched for, which is not similar to performing a query. For example, if you are looking for a contact with the last name Smith, and enter Smith followed by a space in the Starting with field, any contacts with the last name Smith will not be found. This is because the system is looking for each character (all the letters in Smith *and* a space).

To find a specific record in a selection dialog box

1. In the selection dialog box, from the Find drop-down list, select the column you want to search on.
2. In the Starting with field, type the text you are looking for.

3 Click Go.

The records matching your criteria appear.

Querying for Records in a Selection Dialog Box

You can query within a selection dialog box just as you would within a list or form. This allows you to search for specific information from one column or from several columns at one time.

To query in a selection dialog box

1 In the selection dialog box, click Query.

A blank row or a blank form appears in the selection dialog box.

2 Enter your query criteria.

The Siebel application automatically assumes a wildcard exists at the end of text entered in the query fields. This means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe.*

3 Click Go.

The records matching your query criteria appear.

Related Topic

"Simple Query Operators" on page 85

9

Using Query to Locate Information

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

Topics in This Section

"About Querying" on page 80

"Creating, Executing, and Saving Queries" on page 81

"Refining Queries" on page 82

"Deleting Queries" on page 82

"Canceling Long-Running Queries" on page 82

"Using the Query Assistant" on page 83

"About Using Default Queries" on page 84

"About Querying a Telephone Number" on page 84

"Simple Query Operators" on page 85

"Compound Query Operators" on page 87

"Query Tips" on page 88

Related Topics

"Querying for Records in a Selection Dialog Box" on page 77

"Setting Up Default Queries" on page 148

"Displaying Record Count" on page 59

About Querying

Querying is a way to locate one or more records that meet your criteria. The subset of records found by a query can be viewed on-screen, exported to a file, or used as input for a report. A query searches the database for a specific subset of data based on one or more conditions or criteria. For example, you may need to find all open service requests with a high priority. This query is performed in the Service screen with the query criteria of Status = Open and Priority = High.

When you create a query, you can save and reuse the criteria.

Predefined Queries

Your organization can provide predefined queries (PDQs). These predefined queries already have their criteria established and are found in the Queries drop-down list.

For example, if you are located in the western United States and always work with accounts located in California, the Queries drop-down list may contain a PDQ called CA Accounts that finds all the accounts in California. Every time you want to see only the California accounts, you do not have to create a new query. You can simply select the predefined CA Accounts query from the Queries drop-down list. An example of the Queries drop-down list is shown in Figure 40.

You cannot change predefined queries created by your organization.

When you execute a predefined query, the query always runs against *all* the data in the current screen. Even if you have run a query to narrow the data set, the predefined query always uses *all* data within the screen, not just the data shown in a list.

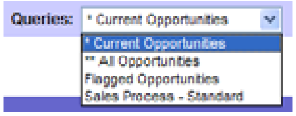


Figure 40. Example of Queries Drop-Down List

Case and Accent Insensitive Queries

Siebel 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 your query. This capability is particularly important when searching for records such as contact or customer names. For example, a query that contains capitalization (such as MacArthur versus Macarthur) or where the use of accents is not consistent, an exact-match search might not return any records.

Your Siebel administrator can configure specified 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. Whereas the fields that contain the property, *Case Required*, represent non CIAI-enabled fields.

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

Creating, Executing, and Saving Queries

You can create your own queries and save them in the Queries drop-down list for later use. Queries that you create are called user-defined queries. They allow you to enter your own criteria to locate a specific set of records.

To create, execute, and save a new query

1. Navigate to the desired screen.
2. Do one of the following:
    - In the list or form, click Query.
    - In the list or form, click the menu button, and then click New Query.
    - Click the new query button on the toolbar.
    - In a list or form, right-click and choose New Query.
    - From the application-level menu, choose Query > New Query.
    - Use the appropriate keyboard shortcut.

   Depending on where you are 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.
4. Do one of the following:
    - In the list or form, click Go.
    - In the list or form, click the menu button, and then click Run Query.
    - Click the execute query button on the toolbar.
    - In a list or form, right-click and choose Run Query.
    - From the application-level menu, choose Query > Run Query.
    - Use the appropriate keyboard shortcut.

   The query executes and the matching records appear.
5. From the application-level menu, choose Query > Save Query As.

   The Save Query As dialog box appears.
6. In the Query Name field, enter a name for the query and click OK.

   The saved query now appears in the Queries drop-down list.

Refining Queries

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

NOTE: If you refine the criteria of a predefined query, you can only save your changes by saving the query with a different name.

To refine a saved query

1. Navigate to the desired screen.
2. From the Queries drop-down list, select the desired query.

   The records meeting the query criteria appear.
3. Do one of the following:
   - Click the menu button, and then click Refine Query.
   - In a list or form, right-click and choose Refine Query.
   - From the application-level menu, choose Query > Refine Query.
   - Use the appropriate keyboard shortcut.
4. Add and edit the criteria.
5. Click the menu button, and then click Run Query.

   The query is executed and the records appear.

Deleting Queries

You can delete user-defined queries.

To delete a saved query

1. Navigate to the desired screen.
2. From the application-level menu, choose Query > 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

Depending on how your Siebel application has been set up, you may 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, a dialog box appears.

2. Click Cancel.

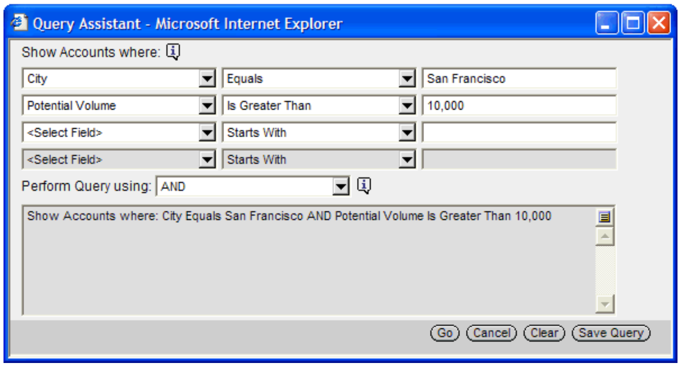
   A confirmation dialog box appears to confirm that the query canceled successfully.

3. Click OK.

Using the Query Assistant

After clicking Query in a form or list, you can click Query Assistant to launch a dialog box that will guide you through creating a query. The Query Assistant button appears to the right of the Cancel button after you click Query. The Query Assistant dialog box can be helpful if you do not want to add your own query operators or are not familiar with query operators. When you use the Query Assistant, you do not need to enter operators to find the information you are looking for. You can also save your query by clicking Save Query before you execute the query. The query assistant example shown in Figure 41 is querying for all accounts in which the value in the City field is San Francisco and the value in the Potential Volume field exceeds $10,000. Querying in the Query Assistant is case-insensitive.

NOTE: It is not possible to use EXISTS in the Query Assistant for MVG fields.



Query Assistant - Microsoft Internet Explorer

Show Accounts where:

City | Equals | San Francisco
Potential Volume | Is Greater Than | 10,000
<Select Field> | Starts With |
<Select Field> | Starts With |

Perform Query using: AND

Show Accounts where: City Equals San Francisco AND Potential Volume Is Greater Than 10,000

Figure 41. Example of Query Assistant Dialog Box

To perform a query using the Query Assistant

1. Navigate to the desired screen.
2. In the list or form, click Query.

   Depending on where you are when you invoke the new query command, a blank form or a blank row in a list appears.

3. Click Query Assistant.

   The Query Assistant appears.

4 In the first row, from the Select Field drop-down list, choose a field to query on.

5 In the first row, from the drop-down list to the right of the field you just selected, choose an operator for the query.

6 In the first row, in the field to the right of the operator you just selected, enter the value you want to query for.

7 Fill in other rows as desired.

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

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

9 Click Go.

   The query executes, the Query Assistant closes, and matching records appear.

NOTE: If there are no values in the Query Assistant's drop-down lists, contact your Siebel administrator.

About Using Default Queries

When you navigate to any new screen, the records that appear are based on the default query set up for that screen. You can specify a different default query from the User Preferences screen. If there is no default query set up, the first predefined query in the Queries drop-down list will execute.

NOTE: You cannot indicate a blank query as the default. There is no way to set user preferences so that no query is executed when you navigate to a new screen.

If you have set up a default query for a visibility filter, it will only be executed if you access that view using the Site Map link. Using the visibility filter to access that filter's default query will fail. If the visibility filter in question has been set up as the default view for that screen, clicking the screen tab will execute the default query for the filter.

Related Topic

"Setting Up Default Queries" on page 148

About Querying a Telephone Number

When you perform a query on a telephone number, the country code of the default country specified in your computer's regional settings automatically prefixes the query (unless the default country is the United States, in which case no prefix is added). For example, if the default country is Germany, and you type 0181 in the telephone field of a query, the German country code (+49) is added to the query (that is, +49*0181*).

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

For example, a European user enters the phone numbers of his business contacts throughout the continent. Whenever he travels to another country, he sets the default country on his laptop computer to that country. When he is in Germany, he needs local phone numbers; therefore, German numbers are returned by default on each query. If he wants to find the number of a contact in England while in Germany, he must enter +44 before his query. When he next travels to England, he will not use his German and Italian contacts as much; therefore, only English numbers will be returned (by default) on each query.

CAUTION: Including a hyphen in your telephone number query will cause the query to fail. Do not include hyphens when querying a telephone number.

Simple Query Operators

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

CAUTION: Query operators are reserved in Siebel query language. If you create a query that has a query operator in it, you must put the query in double quotes. For example, running a query for records containing the text *call is closed* will fail. 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 put *"call is closed"* in double quotes, the system will be able to return all records containing the text *call is closed*. Other reserved operators include apostrophe ('), comma (,), parentheses (()), double quotes (""), tilde (~), and comparison operators such as =, <, and >.

In Table 12, operators are shown in uppercase; however, query strings are case-sensitive, and the operators do not have to be in uppercase.

Simple query operators can be used on their own.

Table 12. 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 at the position at which the asterisk appears, including a space. You cannot use * to find dates. 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 nonprintable characters, such as line feeds (LF) or carriage returns (CR).	*rang* finds *arrange, arranged, orange, orangutan, range, ranges, ranging, rang, strange, stranger, strangest, strangle, wrangle,* and so on. **NOTE:** If performance is poor when you use the asterisk (*), substitute "IS NOT NULL" in your query. This often improves performance, and will return the same sets of records.
?	Wildcard operator. Placed anywhere in a string, returns records containing the characters specified 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*.
""	Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order with exact upper or lower case lettering.	"Sun Solaris" finds records that contain *Sun 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 turns off wildcards within the query value. **NOTE:** For CIAI-enabled fields, if you type "=abc*", the query becomes a case-sensitive query, because you use an equal sign (=) as an operator in the query.
<	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 before 20 June 2001. When entering a date, use the format that is specific to your implementation.

Table 12. Simple Query Operators

Operator	Description	Example
>	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.	Enter `IS NULL` in the Due Date query field to find 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.	Enter `IS NOT NULL` in the Due Date query field to find 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. **NOTE:** You can enter a CIAI query expression for a contact as follows: [Last Name] ~Like abc*

Compound Query Operators

In Table 13, operators are shown in uppercase; however, query strings are case-sensitive, and 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 13. Compound Query Operators

Operator	Description	Example
AND, and	Placed between values, returns only records for which all the given 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.
()	Surrounds the values and operators that will be 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*. **NOTE:** The LIKE operator is case sensitive. To find matches regardless of case, see (~).

Query Tips

Keep the following tips in mind when you create and execute queries:

- The Siebel application automatically adds a wildcard to the end of your query. This means that if you search for Siebe, the Siebel application looks for all words beginning with the letters Siebe.
- When you create a query, the records matching the query criteria appear in a list. As 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 the query was executed. The list is reset to the default list of records when you leave the current screen.
- If you no longer need the list of records found in a query and want to reset the list, click the current screen tab to return to the default set of records.

- If a predefined query created by your organization appears in the Queries drop-down list, you cannot delete this query from your list. However, you can modify the query criteria and save them using another name. See "Refining Queries" on page 82.
- You cannot query on Notes views when you are connected to the server.
- Any queries executed in Administration screens against multi-value group fields will automatically be appended by EXISTS(). This allows you to see every record, regardless of whether it is a primary record or not.
- When you create a query and navigate through the views, use the List hyperlinks in the link bar to return to the queried list of records.
- If you are executing a query that includes more than one consecutive blank space, you must place quotes around the query or the spaces will be ignored and you will receive inaccurate results.
- When the results appear in list format, the first record is highlighted. It may appear as though the record you selected before running the query is being displayed again, but you are actually seeing a new set of records resulting from your query.

10 Using Search to Locate Information

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

Topics in This Section

"About Search" on page 92

"Using the Search Center" on page 92

"Setting Search Preferences" on page 93

"Viewing Your Search Results" on page 94

"Working with Result Records" on page 94

"Saving Your Search Criteria" on page 95

"Viewing Your Recent Saved Searches" on page 95

"Search Operators" on page 96

About Search

Search is a text retrieval tool that allows you to perform searches for text within your application and in documents inside and outside your application.

Siebel Search Center allows you to search for information and view the results without losing the current data on your screen. You can create searches from anywhere within your Siebel application using the Search Center.

Oracle Secure Enterprise Search (SES) and FAST InStream, a third-party search engine, are both integrated into the Search Center and are used for building and administering search indices. For more information about search functionality, see *Siebel Search Administration Guide*.

Using the Search Center

Use the search button to open the Search Center. The Search Center opens in a frame on the left of the screen, while the data you are currently displaying is maintained on the right of the screen.

To perform a search

1. Do one of the following:
   - Click the search button on the application toolbar.
   - From the application-level menu, choose View > Action Pane > Search.
   - Click the Site Map button on the application toolbar and then click the Search hyperlink.
   - Use the appropriate keyboard shortcut.

   The Search Center appears in a frame on the left part of the application window.

2. Enter your search criteria in the Search for field.

   NOTE: The Siebel application automatically adds a wildcard to the end of your search criteria. This assumption means that if you search for *Siebe*, the Siebel application looks for all words beginning with the letters *Siebe.*

3. From the Look In drop-down list, select the type of information you want to find.

   The type of information that you choose from the Look In drop-down list determines the fields that are available to you when entering the search criteria.

   NOTE: If Search is invoked from the context of a particular screen, for example, Service Request, the Look In field automatically returns to that screen by default.

4 Click Go or click Advanced Search if you want to further refine your search.

If you click Advanced Search, the Advanced Search screen appears.

When performing an advanced search, you can choose from a number of categories, some of which are described in the following table.

Option	Comments
Perform Search Using	You can perform searches with Boolean operators. Boolean operators refer to terms that allow you to refine a search. These terms are AND, OR, and NEAR. Boolean operators are supported for integration with FAST but are not supported for integration with Oracle SES. For a list of search term operators, including the variant forms of the Boolean operators, see *Siebel Search Administration Guide*.
Modified Between	Select this option to get the results modified between particular dates. For example, you might want to search documents modified between last year and today.
Look In	Select the categories from where you want to perform your search.
File Format	You can select which file formats that you want to use to display the results of your search. File format is supported for integration with FAST but is not supported for integration with Oracle SES.
Data Source	You can choose to retrieve your search results from multiple data sources. For example, you can choose to search a Siebel repository or any other application repository, such as Microsoft Exchange, Microsoft SharePoint, or an intranet. Dynamic sorting is supported for integration with FAST but is not supported for integration with Oracle SES.

5 From the Search Results view, click the hyperlink to go to the results of your search. The record appears in the application window.

To close the Search Center

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

Setting Search Preferences

You can set the preferences to refine the search you want to perform. For example, after obtaining the results of a Search or Find, you can resort the results by setting your search parameters, so that it is easier to find the items that you want.

To set search preferences

1 Do one of the following:

- From the Search screen, click the Search Preferences tab

- Choose Navigate > Site Map > Search > Search Preferences.

The Search Preferences screen appears.

2 To change the scope of your search, choose from the options in the following table.

Option	Comments
Number of Records	From the drop-down list, choose the number of records to display on each page in the Search Results page.
Results Window	Check if you want the search results displayed in a new browser window.
Default Sort	Choose how you want to sort the search results. The default is to sort by data source. Data source is supported for integration with FAST but is not supported for integration with Oracle SES. Other sort options are date, relevance or result type.
Context Sensitivity	Choose between Context-Sensitive or Persistent.
Criteria Reservation	Clears the search or resume from the previous search.

3 Click Save Preference.

Viewing Your Search Results

You can view your search results in the Search Results view.

To view your search results

1 Do one of the following:

- From the Search screen, click the Search Results tab.
- Choose Navigate > Site Map > Search > Search Results.

The Search Results view appears.

2 Click the hyperlink to go to the results of your search. The record appears in the application window.

Working with Result Records

The Search Results view returns a list of all the records that match your search criteria. The records are sorted in the sort option that you choose in the Default Sort area in the Search Preferences view. From the Search results view, you can choose to sort the results of your search by relevance, data source, results type, and date. The Date column shows the date that the search keyword was indexed.

From Search Results view you can also refine your search results further by using the keywords found in the search results in the Refine Results column. These keywords are automatically created by the search engine, based on the search criteria that you enter. The refine results feature is supported for integration with FAST but is not supported for integration with Oracle SES.

To display a result record in the application window

1. On the Siebel application toolbar, click the Search button and perform a search.
2. The records that match your search criteria appear in the Search Results view.
3. In the Results list, click the record’s hyperlink. The record appears in the application window.

NOTE: Employee related search data is integrated with the collaboration options. Click the icon to the left of your employee search results to see the collaboration options that are available to you, such as call, email, or schedule a meeting with the contact.

Saving Your Search Criteria

After a search result has been found, you can further refine your search by selecting new categories, modifying the query term, modifying the operators, or changing the filter field values. You can save these criteria for future use.

To save your search criteria

1. Do one of the following:
   - From the Search screen, click the Save Searches tab.
   - Choose Navigate > Site Map > Search > Search Preferences.

   The Save Search view appears.
2. In the Save As field, enter a unique name for your search.
3. In the Note field, enter a brief description of your search.
4. Click Save.

Viewing Your Recent Saved Searches

You can view your recent saved searches by clicking the Recent Saved Searches link at the bottom of the Search pane. It displays the saved searches, based on the current screen in the application. You can execute the saved search by drilling down on the record. The results are displayed in the Search results view if the result contains more than one record.

Search Operators

Table 14 describes the two wildcard operators you can use to refine your searches.

Table 14. Description of Search Operators

Operator	Description
*	Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space. For example, ***rang*** finds *arrange*, *arranged*, *orange*, *orangutan*, *range*, *ranges*, *ranging*, *rang*, *strange*, *stranger*, *strangest*, *strangle*, *wrangle*, and so on. It is not necessary to put a wildcard at the end of the word; for example, Siebe will return *Siebel*.
?	Placed anywhere in a string, returns records containing the characters specified in the string, and also containing any single character at the location of the question mark. For example, ?rag finds *brag*, *crag*, or *drag*, but not *bragging*. t?pe finds *type* and *tape*, but not *tripe*. To find a question mark, precede the question mark with a backslash (\?).

11 Using Task UI

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

Topics in This Section

About Task User Interface on page 98

Using Task UI on page 98

Navigational Buttons for Task UI on page 99

About Task User Interface

The 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

For more information about Task UI, see *Siebel Business Process Framework: Task UI Guide*.

Task UI features help increase the efficiency of:

- Novice or intermittent users by guiding them through the execution of unfamiliar tasks
- Experienced users who need to switch between multiple tasks throughout their working day

The task UI includes the following features that support task execution:

- **Tasks Pane.** The left side of the screen contains a context-sensitive 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.
- **Playbar.** 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 steps and provides the ability to pause a task for later resumption or cancel a task. For more information about the navigational buttons, see Navigational Buttons for Task UI on page 99.
- **Radio Buttons.** Radio buttons provide support for decision-making within a task. Based on the choices within a task, you can access different branches and different screens.

After you launch a Task item, it remains active until you end it. This action means that if you launch Tasks, and then navigate to a different screen, the Task steps do not change.

Using Task UI

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

To use tasks

1. Do one of the following:
    - From the application-level menu, choose View > Action Pane > Tasks.
    - Click the Tasks button on the application toolbar.

    The Tasks pane appears on the left side of the application window. The pane lists the Tasks items related to the current screen. The Tasks pane remains open until you close it.
2. In the Tasks pane, drill down on an item to launch the Tasks wizard.
3. Select one of the radio buttons to choose an option, and click Next.
4. Follow the instructions as outlined in the wizard.

To close the Tasks pane

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

Related Topic

About the Application Toolbar on page 21

Navigational Buttons for Task UI

Many of the buttons described in Table 15 can appear at the bottom of the Task UI wizard. In addition to these buttons, your Siebel application might contain additional buttons.

Table 15. Navigational Buttons in Task Wizard

Button	Description
Previous	The Previous button 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 where data has been committed to the database.
Next	The Next button navigates to the next step in the task. This button also acts as a validation point 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	The Pause button saves the task in its current stage and sends the task to your Inbox. You can launch the task later and resume from where you left off. You can set this option from User Preferences. From the application-level menu, choose Tools > User Preferences. The User Preferences screen appears. On the link bar, click Behavior. The Behavior form appears. Select the check box labeled, Prompt to Pause When a User Interrupts a Task button.
Cancel	The Cancel button deletes the task without saving any data, but in the case of a task that has been previously saved, restores it to its previous state. The Pause and Cancel buttons are enabled for all steps. An exception occurs when the data has already been committed, then the Cancel button is disabled for the last step.
Submit	The Submit button indicates that data will be written while in the middle of a task. This action means that some data is posted to the database rather than queued until the end of the task.

12 Sharing Information

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

Topics in This Section

"Running Reports" on page 102

"Emailing, Faxing, Paging, and Wireless Messaging" on page 102

"Using the HTML Editor" on page 104

"Creating Siebel Bookmarks" on page 107

"Creating Shortcuts to Siebel Records" on page 107

"Importing Data" on page 108

"Exporting Data" on page 109

Running Reports

Reports allow you to display key information residing in your system in a predefined, organized format. You can view and print reports in your Siebel application.

You can access reports by clicking the Reports button in the application toolbar. Most screens provide reports. Different reports are associated with each screen. The particular reports available depend on the current screen. Reports are displayed in a browser window.

To run a report

1. Navigate to the screen that contains the information for which you want to run a report.
2. (Optional) Limit report data by running a query.
3. On the Siebel application toolbar, click the Reports button.

   The list of available reports appears in a pop-up menu.

4. Click the report you want to run.

   The report appears in a new browser window. The upper part of this window has a set of controls that you can use to print the report and save it.

Related Topic

"Using Query to Locate Information" on page 79

Emailing, Faxing, Paging, and Wireless Messaging

You can send email messages, faxes, pages, and wireless messages from within your Siebel application. The record that is active when the Send command is executed determines what information will be sent and what options are available. The following commands are available on the application-level File menu:

- **Send Email.** Allows you to send email directly from your Siebel application.
- **Send Fax.** Allows you to send a fax directly from your Siebel application.
- **Send Page.** Allows you to page someone directly from your Siebel application.
- **Send Wireless Message.** Allows you to send a message to another person's wireless device from your Siebel application.

You may not have access to send functionality, depending on the configuration of your application. Contact your Siebel administrator for details.

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

Topic in This Section

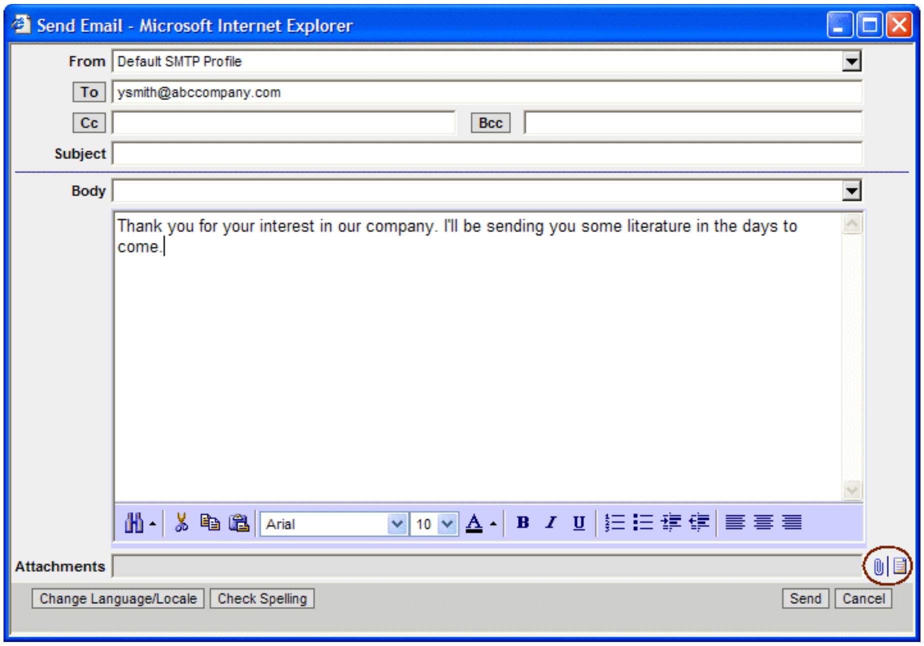
“Using the Send Email Command” on page 103

Related Topic
“Setting Outbound Communications Preferences for Send Email” on page 145

Using the Send Email Command

Using the Send Email command, you can send email messages from any context within your Siebel application. Depending on how the Siebel administrator has configured the application, you can use context-specific email message templates to improve efficiency and standardize replies for types of communications that occur frequently. Figure 42 on page 103 provides an example of the Send Email dialog box.

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



From: Default SMTP Profile

To: ysmith@abccompany.com

Thank you for your interest in our company. I'll be sending you some literature in the days to come.

Figure 42. Example of Send Email Dialog Box

To send an email from your Siebel application

1. Navigate to the desired screen.
2. Select the record from which you want to send the email.

   Depending on the view you are in, data associated with the record may be inserted into the email.

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

   The Send Email dialog box appears.

   NOTE: The Pick Recipients dialog box may appear, depending on the screen you are in when you invoke the Send Email command. If it does, select a recipient from the list (you may select None) and click OK.

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

Fill in the appropriate fields. You can select a template containing predefined text for the email from the Body drop-down list.

4. (Optional) Attach literature and other files to the email by clicking either the add literature or add attachment button (highlighted in step 3). Launching the email from an attachment record automatically attaches the file to the email.

   NOTE: If you attach multiple documents to the email (either literature items or documents), only the last item you attached appears in the Attachments field. To see a list of all attached items, click the add attachment button.

5. (Optional) If you selected HTML as your Default Message Format user preference, you can edit aspects of the message text such as font size, font color, paragraph justification, and so on. This formatting will be visible to the email recipient if the recipient's email client software supports HTML.
6. (Optional) Click Check Spelling to run a spell check on the text of the email.
7. Click Send to send the email.

Related Topics

"Using the HTML Editor" on page 104

"Setting Outbound Communications Preferences for Send Email" on page 145

Using the HTML Editor

Throughout your application, you might come across various screens in which you can invoke an HTML editor.

Your user preferences must be set up 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 145.

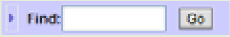
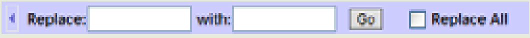
The HTML editor provides special editing controls that allow you to use supported HTML formatting, and also provides some standard editing features such as cut and paste. Table 16 describes each button available in the HTML Editor toolbar.

Some buttons may not be available, depending on where in the application you are when you launch the editor.

Table 16. HTML Editor Toolbar Button Descriptions

Button	Name	Description
≡	Align Center	Click to center each line of selected paragraphs.
≡	Align Left	Click to left-align selected paragraphs.
≡	Align Right	Click to right-align selected paragraphs.
B	Bold	Click to apply bold formatting to selected text, or to remove bold.
☰	Bullets	Click to apply bullets to selected text, or to remove bullets. Creates a list of bulleted paragraphs, corresponding to an HTML unordered list. Bullets appear differently at different levels of indenting. **NOTE:** Items that are at the same indentation level within a list must have the same list type, either all items bulleted or all items numbered. List items that are at different indentation levels can have different list types. This means you can nest an indented list of one type (such as a bulleted list) within a list of another type (such as a numbered list).
📋	Copy	Click to copy selected text to the clipboard.
✂	Cut	Click to cut selected text to the clipboard.
⇤	Decrease Indent	Click to decrease the indenting for selected paragraphs.
🖼	Embed Image	Click to embed an image in the document.
🔗	Embed Link	Click to embed a link in the document.

Table 16. HTML Editor Toolbar Button Descriptions

Button	Name	Description
	Find/Replace	Click the arrow to the right of the binoculars to display the Find controls. The Find controls appear above the editing bar. Click the arrow on the left side of the Find controls to toggle between Find controls and Find and Replace controls. To find specified text, enter the text to find in the Find field, and then click Go.  Find: Go To replace specified text, enter the text to replace in the Replace field. Enter the replacement text in the with field. If you want to replace all instances of the specified text, select the Replace All check box and then click Go.  Replace: with: Go ☐ Replace All
Arial ▾	Font	Choose a font from a drop-down menu to apply to selected text. Available fonts include Arial (the default), Verdana, Times New Roman, and Courier.
A	Font Color	Click the arrow to display font colors above the editing bar, and then click to choose a color to apply to selected text. The line beneath the letter A indicates the currently selected font color.
10 ▾	Font Size	Choose a size from a drop-down menu to apply to selected text. Point sizes include 8 (the default), 10, 12, 14, 18, 24, and 36.
	Increase Indent	Click to increase the indenting for selected paragraphs.
I	Italic	Click to apply italic formatting to selected text, or to remove italics.
	Numbering	Click to apply numbering to selected text, or to remove numbering. Creates a list of numbered paragraphs, corresponding to an HTML ordered list. **NOTE:** Items that are at the same indentation level within a list must have the same list type, either all items bulleted or all items numbered. List items that are at different indentation levels can have different list types. This means you can nest an indented list of one type (such as a bulleted list) within a list of another type (such as a numbered list).
	Paste	Click to paste text from the clipboard into the message area. Depending on the source, text you paste may include HTML formatting.
U	Underline	Click to apply underlining to selected text, or to remove underlining.

Creating Siebel Bookmarks

A Siebel bookmark is a URL that links to a specific record in the Siebel application. A bookmark included in an email message or document allows a user to click to navigate directly to this record in an active instance of the Siebel application.

To add a Siebel bookmark to an email or document

1. Navigate to and select the record to which you want to create a link.
2. From the application-level menu, choose File > Create Bookmark.

   The Get Bookmark URL dialog box appears.
3. In the Get Bookmark URL dialog box, click and drag the URL icon to the email message or document.

   This creates a hyperlink to the Siebel record from the email or the document.
4. Click OK in the Get Bookmark URL dialog box.

   Now a user can click the link in the email or document and be taken to the record, as long as the Siebel application is active on their machine.

Creating Shortcuts to Siebel Records

You can drag a record from your Siebel application to your desktop to create a shortcut. When you have the shortcut on your desktop, you can drag the shortcut to an email message, a document, and so on. A shortcut allows you or another user to click to navigate directly to this record. If the Siebel application is not running when you click a shortcut, you will have to log in first.

To create a Siebel shortcut on your desktop

1. Locate and select the Siebel record you want to create a shortcut for.
2. Click the record and drag it to your desktop.

   NOTE: To drag the shortcut to your desktop, you will need to resize your Siebel application so that you can see a portion of your desktop. You can then drag the record from your Siebel application to your desktop.

To drag a Siebel shortcut from your desktop to another location

1. If the desired location is not visible, click and drag the record to the location’s task bar item at the bottom of the screen.
2. Without releasing the record, pause over the task bar item, and the application will appear in the foreground.
3. Once the location is visible, move your cursor over the location and release the record.

   A shortcut to the selected record is now created.

Importing Data

You can only import data into certain parts of your 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. For more information, see "About Synchronizing with a Personal Information Manager Server" on page 115.

If you want to import Accounts or Opportunities, contact your Siebel administrator.

You can import a maximum of 2000 records at one time.

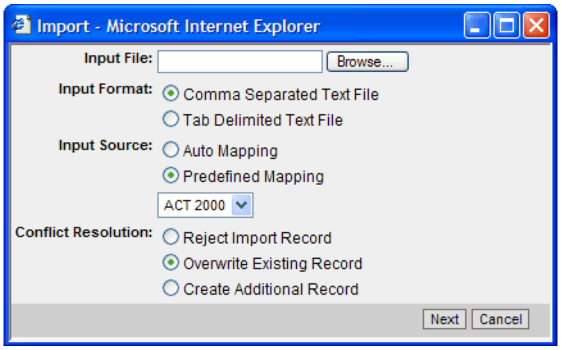
To import data into the application

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

   NOTE: You cannot use the import function from a view tab.

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

   The Import dialog box appears.



Input File:
Input Format: ● Comma Separated Text File ○ Tab Delimited Text File
Input Source: ○ Auto Mapping ● Predefined Mapping
ACT 2000
Conflict Resolution: ○ Reject Import Record ● Overwrite Existing Record ○ Create Additional Record

3. Click Browse next to the Input File field to select the file you are importing.

   The Choose File dialog box appears.

4. Select the file you want to import and click Open.

5. From the Input Format field in the Import dialog box, select the format of the input source file: Comma Separated Text File or Tab Delimited Text File.

   CAUTION: The file you are importing has to match the format you select from the Input Format field.

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

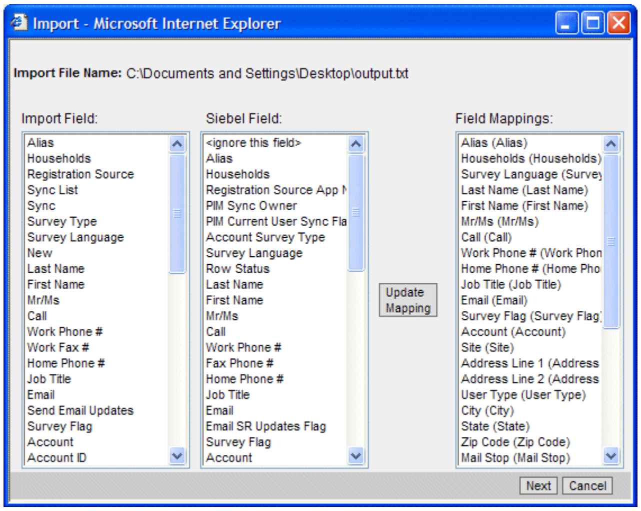
   Auto mapping uses the structure of the import file to map fields. Predefined mapping uses a set format based on the source application, for example, ACT!. When you select Predefined Mapping you must select the corresponding source from the Input Source drop-down list.

   NOTE: When importing using predefined mapping, you need to have all the fields defined in the Import Object in Siebel Tools. A certain format is required for predefined mapping. Contact your Siebel administrator for details.

7 Use the Conflict Resolution Method buttons to select the method you prefer to use if the import encounters a conflict between records: Reject Import Record, Overwrite Existing Record, or Create Additional Record.

8 Click Next.

If you chose Predefined Mapping, go to Step 10. If you chose Auto Mapping, the Import mapping dialog box appears.


Import - Microsoft Internet Explorer
Import Field:
Alias
Households
Registration Source
Sync List
Sync
Survey Type
Survey Language
New
Last Name
First Name
Mr/Ms
Call
Work Phone #
Work Fax #
Home Phone #
Job Title
Email
Send Email Updates
Survey Flag
Account
Account ID
Siebel Field:
<ignore this field>
Alias
Households
Registration Source App N
PIM Sync Owner
PIM Current User Sync Fla
Account Survey Type
Survey Language
Row Status
Last Name
First Name
Mr/Ms
Call
Work Phone #
Fax Phone #
Home Phone #
Job Title
Email
Email SR Updates Flag
Survey Flag
Account
Update Mapping
Field Mappings:
Alias (Alias)
Households (Households)
Survey Language (Survey
Last Name (Last Name)
First Name (First Name)
Mr/Ms (Mr/Ms)
Call (Call)
Work Phone # (Work Phon
Home Phone # (Home Pho
Job Title (Job Title)
Email (Email)
Survey Flag (Survey Flag)
Account (Account)
Site (Site)
Address Line 1 (Address
Address Line 2 (Address
User Type (User Type)
City (City)
State (State)
Zip Code (Zip Code)
Mail Stop (Mail Stop)
Next
Cancel

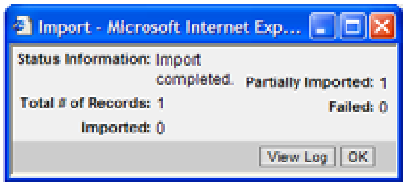
Import File Name: C:\Documents and Settings\Desktop\output.txt

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

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

10 Click Next.

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


Import - Microsoft Internet Exp...
View Log
OK

Status Information: Import completed.
Partially Imported: 1
Total # of Records: 1
Failed: 0
Imported: 0

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

Exporting Data

The export feature is valuable when you query for specific data and need to export that data to a separate file. The exported data in the file can be read in Microsoft Excel or imported into other applications.

If the data you are exporting includes dates or numbers, they will be formatted according to your machine's Regional Settings properties. Your Regional Settings are configured using the Microsoft Windows Control Panel. In some cases, the formatting may depend on the Regional Settings set up by your company on the server. Check with your Siebel administrator.

Exporting is performed from a list, allowing you to export a single record or a list of records.

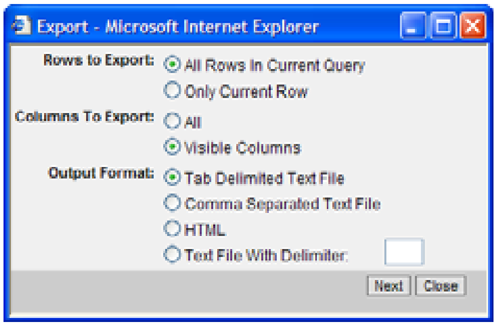
NOTE: If a record you export includes a multi-value group field, only the primary value for that field is exported.

To export data to an external file

1. Navigate to the screen from where you want to export data and run a query to display the desired records.
2. In the main list of data, use the Columns Displayed function to add and remove columns in the list.

   For more information, see "Organizing Columns in a List" on page 67.
3. Click the menu button, and then click Export.

   The Export dialog box appears.



Rows to Export: ● All Rows In Current Query
○ Only Current Row
Columns To Export: ○ All
● Visible Columns
Output Format: ● Tab Delimited Text File
○ Comma Separated Text File
○ HTML
○ Text File With Delimiter:

4. Use the Rows To Export and Columns To Export option buttons to define which 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 *Object Types Reference*.
5. Use the Output Format option buttons to define the format of the output document.

   To correctly export Siebel data to a Microsoft Excel document, use the Tab Delimited Text File option.

   Choosing the Text File With Delimiter option will add quotes around each field value. This is to help differentiate between each column value.
6. Click Next.

   The File Download dialog box appears.

7. Select Save This File to Disk and click OK.

   The Save As dialog box appears.

8. Navigate to the location where you want to save the file and type a filename.

9. Click Save.

   CAUTION: Depending on the amount of data you are exporting, this process can take several minutes. Performance may be affected if you are exporting more than 50,000 records.

13 Synchronizing Data

This chapter describes how to synchronize data in your Siebel application. It includes the following topics:

Topics in This Section

"About Database Synchronization" on page 114

"Illustration of a Synchronization Process" on page 114

"About Synchronizing with a Personal Information Manager Server" on page 115

About Database Synchronization

Synchronization is an important process if you are a remote user of the application. You must synchronize on a regular basis to maintain the database on your remote laptop.

The copy of the database that resides on your laptop is generally referred to as a local database. Your 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 database on the server. This means that you send data to the server and receive data from it, as shown in Figure 43.

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

You need to synchronize regularly to:

- Make sure your database is as current as possible.
- Make sure the total time to synchronize is as short as possible. The more regularly you synchronize, the shorter the synchronization time will be.
- Share updates with colleagues.

NOTE: Synchronizing is your responsibility. You must synchronize 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.

Illustration of a Synchronization Process

Figure 43 illustrates the synchronization process.

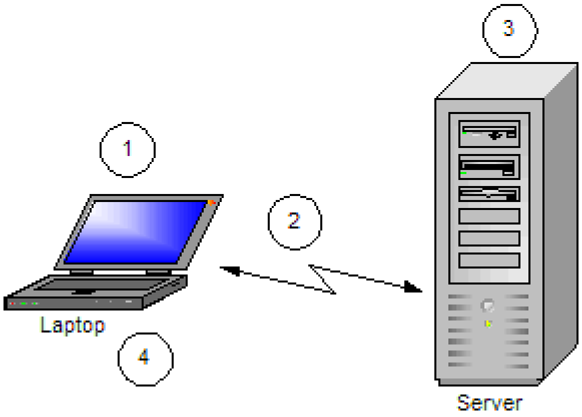


Figure 43. Simulated Synchronization Process

1. You make offline database changes on your laptop.
2. You dial in and synchronize.

   You initiate the synchronization process by choosing File > Synchronize Database from the application-level menu.
3. The server sees all the changes made to the server's database and any new or changed data that came from your laptop.
4. You see all the changes you made to your laptop's database and any new or changed data that came 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, with Microsoft Exchange Server. Synchronization with Microsoft Exchange Server allows Microsoft Exchange client software such as Microsoft Outlook to access the synchronized data. For additional information, see *Siebel Server Sync Guide*.

14 Using the Calendar

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

- About the Calendar on page 118
- About Calendar Views on page 118
- About Viewing Activities on page 119
- About Calendar Activity Defaults on page 120
- About Recurring Activity Defaults on page 121
- About Calendar Activity Fields on page 121
- About Using the Participant Availability Subview on page 121
- About Using Group Calendars on page 123
- About Using Alarms for Activities on page 123
- Viewing Calendar Activities on page 124
- Adding Activities to the Calendar on page 124
- Adding To Do Activities to the To Do List on page 125
- Creating Recurring Calendar Activities on page 126
- Deleting Calendar Activities on page 127
- Deleting Recurring Calendar Activities on page 127
- Marking To Do Activities Complete on page 128
- Changing Calendar Activities on page 128
- Rescheduling Activities on page 129
- Adding Participants to Activities on page 130
- Removing Participants From Activities on page 131
- Reassigning Activities on page 132
- Granting Access to Your Calendar on page 133
- Viewing Other Users’ Calendars on page 133
- Setting Alarms on page 134
- Snoozing and Dismissing Alarms on page 135
- Changing the Date on page 135
- Querying Your Calendar on page 136
- Printing Your Calendar on page 136

About the Calendar

The Calendar screen allows you to manage your time and scheduled activities. The daily, weekly, and monthly views allow you to choose the visual format that works best for you. In the Calendar screen you can schedule activities, view activities that are scheduled simultaneously, view your tasks in a To Do list, and invite participants to meetings.

You can be in the Activities screen and create an activity with a planned start time, and it will automatically be placed on your calendar. Changing the information for a scheduled activity on the calendar automatically changes the same information in the Activities screen that displays that activity. Similarly, changing information about an activity in any Activities screen changes the same information in the Calendar screen.

Calendar views are also available in a number of screens, such as Accounts, Contacts, Campaigns, Projects, and Opportunities. Each Calendar view allows you to create activities without having to go to the Calendar and leave the screen you are in. Calendar views allow you to associate activities with an active record. For example, if you create a new activity in the Calendar view in the Accounts screen, the new activity appears with the Account and Site fields filled in based on the active account record.

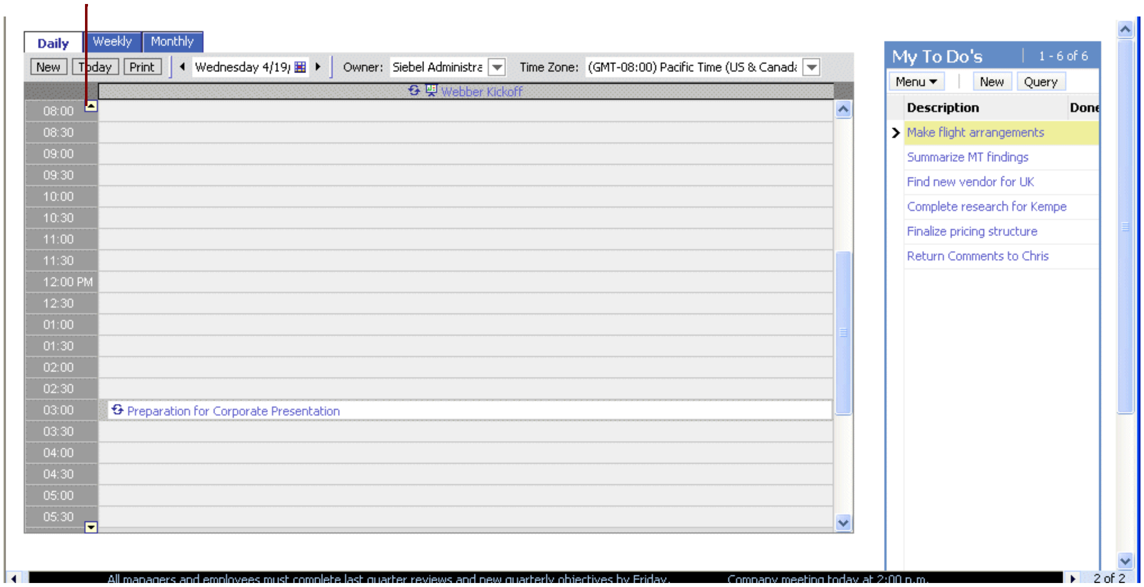
About Calendar Views

As in every Siebel product, the availability of certain features is determined by the configuration of your Siebel application; therefore, the views you see may differ from those described in this discussion of the calendar.

Figure 44 on page 119 shows an example of the Calendar screen. The Calendar has three views:

- **Daily.** Use the Daily view to see your activities that are scheduled for the selected day.
- **Weekly.** Use the Weekly view to see your activities that are scheduled for the selected week. You can switch between a 5 Day Weekly view and a 7 Day Weekly view from the User Preferences screen. For details, see "Setting Up Default Calendar Views" on page 156.
- **Monthly.** Use the Monthly view to see your activities that are scheduled for the selected month. In the Monthly view you can place your cursor over a day to see a full list of the day's activities.

The Calendar screen also displays a To Do list. Activities appear in your To Do list if you specify them as To Do activities. You can view your uncompleted To Do’s in this list. The To Do list is part of the Calendar views, so if you have access to the Calendar views, you have access to the To Do list.


Indicates that an appointment occurs before or after the times shown

Daily
Weekly
Monthly
New
Today
Print
Wednesday 4/19/
Owner: Siebel Administra
Time Zone: (GMT-08:00) Pacific Time (US & Canad
Webber Kickoff
08:00
08:30
09:00
09:30
10:00
10:30
11:00
11:30
12:00 PM
12:30
01:00
01:30
02:00
02:30
03:00
Preparation for Corporate Presentation
03:30
04:00
04:30
05:00
05:30
My To Do's
1 - 6 of 6
Menu
New
Query
2 of 2

Description	Done
Make flight arrangements	
Summarize MT findings	
Find new vendor for UK	
Complete research for Kempe	
Finalize pricing structure	
Return Comments to Chris	

All managers and employees must complete last quarter reviews and new quarterly objectives by Friday. Company meeting today at 2:00 p.m.

Figure 44. Calendar Screen - Daily View

An arrow at the top or bottom of the calendar, highlighted in Figure 44, indicates that an appointment occurs before or after the times shown. Use the scroll bar to see the appointment.

About Viewing Activities

Activities can appear in the Activities screen, in the Calendar, or in the To Do list. The place where an activity appears depends on the place where it is created. Table 17 explains how activities display.

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

Table 17. How Activities Are Displayed

If you create an activity here...	The activity automatically appears here...	Comments
Calendar screen	- Calendar screen - Activities screen	If you do not specify a start time, the activity will only appear in the Activities screen, and not in the Calendar.

Table 17. How Activities Are Displayed

If you create an activity here...	The activity automatically appears here...	Comments
To Do list	■ To Do list ■ Activities screen	
Activities screen	You must decide where you want to display the activity from the Display In drop-down list.	Your options are Calendar and Activities, To Do and Activities, or Activities Only. If you choose Calendar and Activities, but do not assign a start time to the activity, the activity will not appear in your calendar.

About Calendar Activity Defaults

When you create a new calendar activity, a number of fields are filled in with default values. These values are shown in Table 18 as they appear in preconfigured Siebel applications.

Table 18. Calendar Detail Field Default Values

Field	Default Value
Type	Appointment
Start	Current time rounded up to the next calendar interval. For example, if it is 11:02 A.M. and the daily calendar interval specified in your user preferences is 15 minutes, the start time defaults to 11:15 A.M. (If you created the new calendar activity by drilling into a time value along the left side of the Daily or 5 Day Weekly view, the time will be defaulted based on the value you drilled into, regardless of the current time.)
Duration	Default value, in minutes, as specified in your user preferences.
End	Start time plus the value found in the Duration field.
Owner	Your Siebel applications user name.

About Recurring Activity Defaults

When you create a recurring activity, the Repeat Until field defaults to a predetermined value based on what you select from the Repeat Frequency drop-down list. You can change this value as desired. Table 19 shows the default values of the Repeat Until field. For more information about creating recurring activities, see "Creating Recurring Calendar Activities" on page 126.

Table 19. Repeat Until Default Values

If Repeat Frequency value is...	The default Repeat Until value is...
Daily	Today + 7 days
Weekly	Today + 90 days
Monthly	Today + 6 months
Quarterly	Today + 2 years
Yearly	Today + 10 years

About Calendar Activity Fields

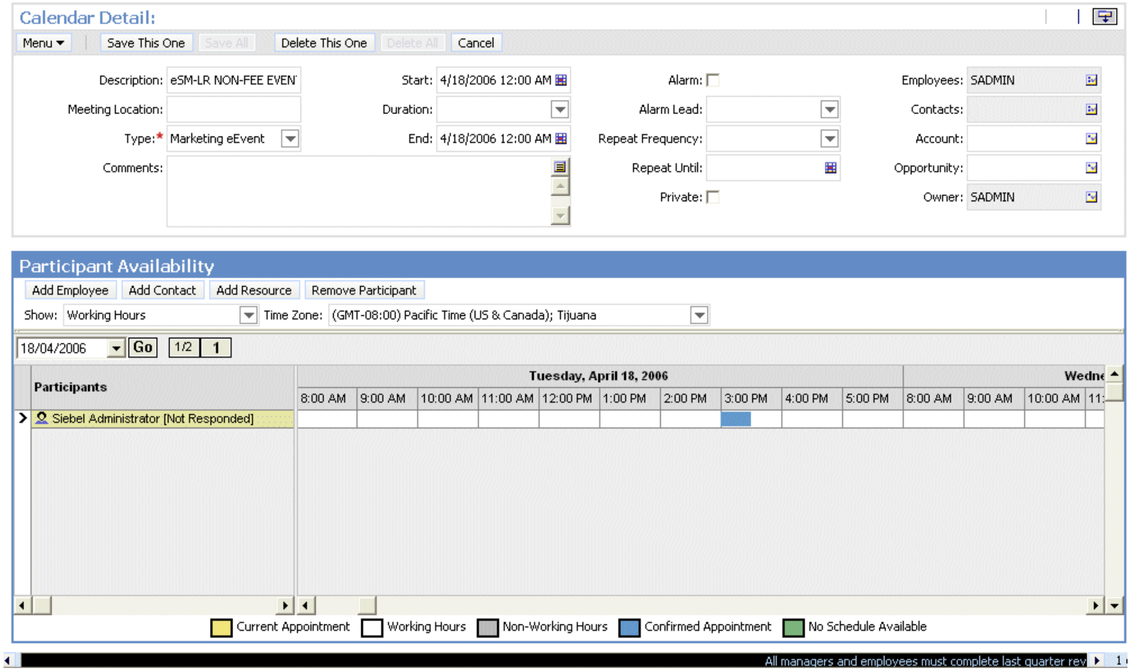
Keep the following in mind when you work with calendar activities.

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

About Using the Participant Availability Subview

The Gantt chart, also called the Participant Availability subview, that appears below the Calendar Detail form for all nonrecurring activities can tell you a great deal about an activity and its participants. The Participant Availability subview is shown in Figure 45 on page 122.

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


Calendar Detail:
Menu
Save This One
Save All
Delete This One
Delete All
Cancel
Participant Availability
Add Employee
Add Contact
Add Resource
Remove Participant
Go
1/2
1
Participants
Tuesday, April 18, 2006
Wedne
8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
8:00 AM
9:00 AM
10:00 AM
11:
Current Appointment
Working Hours
Non-Working Hours
Confirmed Appointment
No Schedule Available

Description: eSM-LR NON-FEE EVEN'
Meeting Location:
Type:* Marketing eEvent
Comments:
Start: 4/18/2006 12:00 AM
Duration:
End: 4/18/2006 12:00 AM
Alarm: ☐
Alarm Lead:
Repeat Frequency:
Repeat Until:
Private: ☐
Employees: SADMIN
Contacts:
Account:
Opportunity:
Owner: SADMIN

Show: Working Hours
Time Zone: (GMT-08:00) Pacific Time (US & Canada); Tijuana
18/04/2006

Siebel Administrator [Not Responded]

All managers and employees must complete last quarter rev

Figure 45. Participant Availability Subview

The following are tips to help you get the most out of this subview:

- Click Add Employee, Add Resource, or Add Contact in the Participant Availability subview to add new participants to an appointment.
- Highlight a participant and click Remove Participant in the Participant Availability subview to remove an existing participant from the appointment.
- All the schedules you see in the subview are converted to the time zone specified in your time zone preferences. For example, if your calendar displays Pacific time, and you are viewing an activity involving a user in the Eastern time zone, 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 her calendar, it is converted to Eastern time.
- You cannot use the Participant Availability subview in conjunction with any recurring appointment.
- Employee working hours have a white background. Nonworking hours have a dark gray background.

- Previously scheduled appointments appear as blue blocks on the calendar. The current appointment appears as a band of light yellow framed between a red line and a green line. You can change the start and end times of the current appointment by holding your cursor over the arrow that appears at the top of either line. Click and drag the line to the time you desire.
- Any changes you make in the Participant Availability subview are automatically reflected in the Calendar Detail form. Likewise, any changes you make in the Calendar Detail form are automatically reflected in the Participant Availability subview.
- Contacts appear in the Participant Availability subview, but have no associated schedules.
- Icons are used to indicate the participant type. A face indicates an employee, a phone book indicates a contact, and a projection screen indicates a resource.
- You can choose to display only your working hours or all 24 hours of the day. To make the choice, select the desired value from the Show field in the Participant Availability subview. You can also set up this preference from the User Preferences screen. For more information, see "Setting Up Default Participant Availability Subviews" on page 157.
- Hold your cursor over a participant's name to find out more information about that participant, including title, account, and time zone.
- You can advance the Gantt chart to a future date by using the horizontal scroll bar at the bottom of the chart. If you want to see more than three days later than the appointment's current date, you must reset the start date in the Calendar Detail form.

About Using Group Calendars

You may need 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 representing your group and give you and your colleagues access to it. Contact your Siebel administrator for details.

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 turns on this notification. For alarm notification, a dialog box or pop-up window appears in the Siebel application window at a predetermined interval before the start of an activity. You can snooze the alarm to have it reappear at a specified interval. For more information about snoozing alarms see "Snoozing and Dismissing Alarms" on page 135. If the activity is a recurring one, the alarm appears at the specified time before the start of each instance of the activity. You can specify the time interval at which an alarm will trigger for each activity when you create it. You can also specify one default time interval for all activities. To learn how to specify one default time interval at which an alarm is triggered before all activities, see "Setting Up Default Alarm Lead Times" on page 155.

Alarms are triggered and displayed only if you are logged in to your Siebel application at the time of the alarm. If you log in after an alarm was scheduled to trigger, it triggers when you log in. Also, an alarm does not appear if your 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 appear in your taskbar. You can click the flashing button in the taskbar to view the alarm.

Depending on the configuration of your Siebel application, you may or may not have access to alarm functionality. Contact your Siebel administrator for more information.

Viewing Calendar Activities

You can view and manage activities in the daily, weekly, or monthly view of your calendar.

To view activities in the daily, weekly, or monthly view

1. Navigate to the Calendar screen.

   The calendar appears, showing the Daily view.

2. Click the Weekly or Monthly tab to change the view.

   TIP: In the Daily and 5 Day Weekly views, arrows appear at the top and bottom of the view to indicate that you have appointments that cannot currently be seen in the calendar. You can scroll up or down to view these appointments. Figure 46 shows an example of one of these arrows.

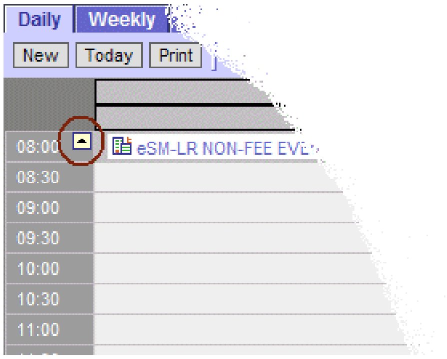


Figure 46. Example of Calendar Scroll Arrows

You can specify any of the calendar views as your default view in the Calendar screen. See "Setting Up Default Calendar Views" on page 156.

Adding Activities to the Calendar

You can add an activity to the calendar from the daily, weekly, or monthly view.

To add an activity to the calendar

1. Navigate to the Calendar screen.

2. In the Daily, Weekly, or Monthly view, click New.

   If you are in the Weekly or Monthly view, you can first highlight a day by clicking on that day. Then, when you click New, the start time will default to the date that you highlighted.

   The Calendar Detail form appears.

3. Complete the fields.
4. Click Save This One.

   The activity appears in your calendar as long as it has a start time. It also appears in your Activities screen.

To type an activity directly in the calendar

1. Navigate to the Daily or 5 Day Weekly calendar view.
2. Do one of the following:
   - In the Daily view, click the area of the calendar where you want to create the activity.
   - In the 5 Day Weekly view, click the day and time where you want to create the activity.
3. Type a description.
4. Click away from the text you typed to create the activity.

Adding To Do Activities to the To Do List

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

To Do activities have the following characteristics:

- To Do activities are activities that have been marked as To Dos.
- To Do activities carry forward every day until they are marked complete.
- To Do activities do not appear in the Calendar itself.

To add a To Do

1. Navigate to the Calendar screen.
2. In the To Do list, click New.

   A blank row appears.

3. Enter values in the Description and Due fields and step off the record.

   To add further information, drill down on the To Do by clicking the Description hyperlink.

TIP: You can also add a new To Do item by creating an activity and selecting To Do and Activities from the Display In drop-down list.

Creating Recurring Calendar Activities

You may find that you have to schedule recurring meetings. Instead of creating a new meeting every time it occurs, you can create one activity and set it to repeat at specific intervals.

CAUTION: When you modify a repeating appointment and click Save All, the changes you made will be applied to the current appointment and to every future appointment in the series. However, every previous appointment in the series will not reflect the changes.

To create a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click New.

   The Calendar Detail form appears.

3. Complete the fields.

   The following table describes some of the fields.

Field	Description
Alarm	(Optional) Select this check box to trigger an alarm for this activity. There is a user preference that automatically turns on the alarm each time you create an appointment. For more information, see "Turning On Alarms for All Calendar Activities" on page 155.
Repeat Frequency	Select Daily, Weekly, Monthly, Quarterly, or Yearly, depending on how often you want this activity to repeat. See Table 19 on page 121 for details about the Repeat Frequency values.
Repeat Until	(Optional) Click the Calendar button in this field to select the date on which you want the activity to stop recurring.

4. Click Save This One.

To change a recurring activity to a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.

3. From the Repeat Frequency drop-down list, choose Non-Repeating.
4. Click Save All.

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

Deleting Calendar Activities

You can delete an activity from the calendar in any view of the Calendar screen.

To delete an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Click Delete This One.

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

Deleting Recurring Calendar Activities

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

To delete one instance of a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink 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.

To delete every instance of a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink 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 before the current day remain on the calendar.

Marking To Do Activities Complete

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

To mark a To Do as completed

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

Changing Calendar Activities

After adding an activity to your calendar, you can go back and make changes to it. You can drill down on the activity and make changes using the Calendar Detail form. When you change a recurring activity, you must make sure to save it properly.

To change a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.
3. Make the necessary changes, and click Save This One.

TIP: 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. See "Setting Up Meeting Email Notification Prompts" on page 156 for more information.

To change a recurring activity

1. Navigate to the Calendar screen.

2 In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

The Calendar Detail form appears.

Make the necessary changes, and click one of the buttons described in the following table.

Button	Description
Save This One	Saves the changes made to the current recurring activity, changes it to a non-recurring activity, and leaves every other recurring activity in the sequence unchanged. For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you make changes to the August 23 instance of the activity and click Save This One, only the August 23 activity will change. It will also become non-recurring and will no longer be associated with the other activities.
Save All	Saves changes made to the recurring activity and to all subsequent recurring activities in the sequence. However, it does not apply the changes to any activities which are scheduled before the date of the current activity. For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you make changes to the August 23 activity and click Save All, the activities scheduled for August 23, August 24, and August 25 will all be updated with your changes, but the activities scheduled for August 21 and August 22 will remain unchanged.

Rescheduling Activities

In the Daily view or the 5 Day Weekly view of the calendar, you can use drag-and-drop functionality or stretching to reschedule activities.

NOTE: You cannot drag appointments across views. For example, you cannot drag an appointment from the Daily view to the Monthly view.

To reschedule an activity using drag-and-drop

1 Navigate to the Calendar screen.

2 Navigate to the Daily or 5 Day Weekly view.

3 Place your cursor over the left edge of the activity.

A cross with arrowheads appears.

4 Drag the activity to the new time slot.

To reschedule an activity by stretching it

1 Navigate to the Calendar screen.

2 Navigate to the Daily or 5 Day Weekly view.

3. To change an activity’s start time, place the cursor on the activity’s top border, and click and drag the activity’s top border to an earlier or later location.
4. To change an activity’s end time, place the cursor over the activity’s bottom border, and click and drag activity’s bottom border to an earlier or later location.

Adding Participants to Activities

When you add an activity to your calendar, you may also want to have a record of the persons who will be attending or participating in the activity. You do this by adding participants to the activity on your calendar and verifying their availability. Participants can include contacts and employees, and resources, such as a projector or a conference room. Figure 45 on page 122 shows an example of the Calendar Detail form and Participant Availability subview.

To add contacts to an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participant Availability view beneath it.
3. In the Participant Availability subview, click Add Contact.

   The Add Contacts dialog box appears.
4. Add a contact by selecting the contact’s record.

   To select more than one contact at a time, hold down CTRL as you click each record or, if the records are consecutive, click the first record, hold down SHIFT, and click the last record.
5. When you have selected the contacts you want to add, click OK.

   The selected contacts appear in the Participant Availability subview and are now part of the activity.

To add employees to an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participant Availability view beneath it.
3. In the Participant Availability subview, click Add Employee.

   The Add Employees dialog box appears. You can use the Query button in the Employees list to find an employee when there is a large number of employees in the organization.
4. Add an employee by selecting the employee’s record.

   To select more than one employee at a time, hold down CTRL as you click each record or, if the records are consecutive, click the first record, hold down SHIFT, and click the last record.

   NOTE: If an alarm is set for this activity, it will go off for all participants on the participant list.

5. When you have selected all the employees you want to add, click OK.

   The selected employees now appear in the Participant Availability subview and are part of the activity.

6. (Optional) Check the Participant Availability subview to verify an employee’s availability.

To add resources to an activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participant Availability view 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.

   The records refresh to display only the records that you selected in Step 4. A check mark appears in the Availability column for any resource that is available during the time of your appointment.

6. Select the records, available or unavailable, that you want to add to your appointment and then click OK.

   The resources appear in the Participant Availability subview. A projection screen icon will appear next to each resource to distinguish them from employees and contacts.

NOTE: You can only add resources to a recurring appointment when you first create it. After you create a recurring calendar activity, you can no longer add resources because the Gantt chart does not appear in conjunction with recurring calendar activities.

Removing Participants From Activities

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

NOTE: You cannot remove a resource from a recurring activity except when you are first creating it because the Gantt chart does not appear in conjunction with recurring appointments.

To remove a participant from a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participant Availability subview below it.

3. Highlight the participant you want to remove by selecting the row the participant appears in.

4. Click Remove Participant.

   The participant is deleted from the activity.

To remove an employee or a contact from a recurring activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.

3. To remove employees, do the following:
   1. In the Employees field, click the select button.

      The Employees shuttle dialog box appears.

   2. In the Selected list, select the employees you want to remove and click < Remove.
   3. Click OK.
4. To remove contacts, do the following:
   1. In the Contacts field, click the select button.

      The Contacts shuttle dialog box appears.

   2. In the Selected list, select the contacts you want to remove and click < Remove.
   3. Click OK.

   The selected participants are removed from the activity.

Reassigning Activities

After creating an activity and adding employees to it, you may find that you need to reassign the activity to a different employee—that is, 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 view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears with the Participants Availability subview below it.

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

   The Employees shuttle dialog box appears.

   The primary employee appears with a check mark in the Primary field. You must change the primary employee to reassign the activity.

4 Click the Primary field in the record of the employee to whom you want to reassign the activity and step off the record.

The selected record updates with a check mark in the Primary field. The Primary field in the original record is cleared.

5 Click OK.

The activity is now reassigned.

6 Remove the previous primary employee from the participant list if that person is no longer involved with the activity.

TIP: Alternatively, to reassign an activity, you can type the name of the new owner in the Owner field. The previous owner is deleted from the activity and the new owner you enter is automatically added into the list of employees and designated as the primary employee.

Granting Access to Your Calendar

When working with your team members, you may find that allowing them to see your activities or to add activities to your schedule is a good communication tool. To grant other people access to your calendar, add members to the Calendar Access List and give them view or update privileges.

NOTE: Calendar sharing can result in the routing of large numbers of activities to mobile clients.

To give others access to your calendar

1 Navigate to the Calendar screen.

2 On the link bar, click Access List.

The Calendar Access list appears.

3 Click New.

The Add Employees dialog box appears.

4 Select an employee by clicking anywhere in the employee record and then clicking OK.

The Calendar Access list appears. The employee you selected appears in the list and can now view your calendar.

5 (Optional) To allow the employee to add activities to your calendar, select the Allow Updates check box.

Viewing Other Users’ Calendars

You can view only calendars to which you have been granted access. If you are a manager, you can view the calendars of your direct reports.

To view another user's calendar

1. Navigate to the Calendar screen.
2. From the Owner drop-down list, choose the user of the calendar you want to see.

   The calendar refreshes to display the other user's calendar.

TIP: If your job often requires you to access another user's calendar, you may want to set up that user's calendar as your default calendar. This can be done from the User Preferences screen. For more information see "Setting Up Another User's Calendar as Your Default Calendar" on page 157.

Setting Alarms

To set 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.

NOTE: In order for alarms to work correctly, make sure that 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 user preferences, see "Setting Time Zone Preferences" on page 142.

To turn on an alarm for a calendar activity

1. Navigate to the Calendar screen.
2. In the Daily, Weekly, or Monthly view, click the Description hyperlink to access the activity.

   The Calendar Detail form appears.

   Select the Alarm check box.

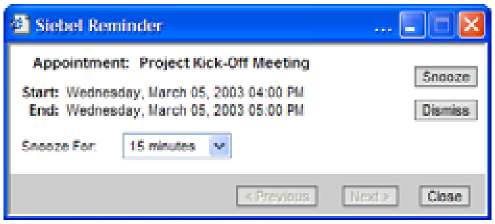
   The Alarm Lead field is automatically populated with the default alarm lead time set up in user preferences. For more information, see "Setting Up Default Alarm Lead Times" on page 155.
3. To change the Alarm Lead time, enter a new value in the field or select a value from the drop-down list.
4. Click Save This One.

   When the alarm pops up, you can choose to dismiss or snooze it.

NOTE: You may want to have alarms go off for every calendar activity you create. You can set this up in your user preferences. For more information, see "Turning On Alarms for All Calendar Activities" on page 155.

Snoozing and Dismissing Alarms

When an alarm appears on your screen, you can dismiss it or snooze it. When you snooze it, you can specify how long the alarm will snooze for. An example of an alarm is shown in Figure 47. You can set one default alarm snooze time for all of the activities you create. This can be done in the User Preferences screen. See “Setting Up Default Alarm Snooze Times” on page 155.



Appointment: Project Kick-Off Meeting

Start: Wednesday, March 05, 2003 04:00 PM

End: Wednesday, March 05, 2003 05:00 PM

Snooze For: 15 minutes

Figure 47. Siebel Reminder Dialog Box (Alarm)

To snooze an alarm when it pops up

1. In the Siebel Reminder dialog box, from the Snooze For drop-down list, choose the length of time for which you want to snooze the alarm.
2. Click Snooze to defer the alarm.

   The alarm reappears after the amount of time you specified has passed.

To dismiss an alarm

- In the Siebel Reminder dialog box, click Dismiss to close the alarm.

  The alarm will not appear again for this activity.

NOTE: If multiple alarms appear before you have a chance to either snooze or dismiss them, they are all queued behind the same alarm popup. You can click the Previous and Next buttons to move to each one. You can also click Dismiss All to dismiss every alarm that is currently active, or you can click Snooze All to defer every alarm that is currently active.

Changing the Date

You can change the date or time zone in any of the Calendar views. This is helpful if you frequently travel in a number of time zones.

You can change the date in any of the Calendar views.

To change the date

- In the current Calendar view, click the arrow to the left of the date field to navigate to an earlier date. Click the arrow to the right of the date field to navigate to a later date. You can also click the calendar select button to launch the calendar dialog box from which you can pick a date.

  The calendar displays activities for the selected date.

NOTE: You can set a default time zone for your calendar in the User Preferences screen. For more information, see "Setting Time Zone Preferences" on page 142.

Querying Your Calendar

You can run queries to find activities in your calendar.

To query your calendar

1. In the Activities screen, create and save the query.
2. Navigate to the Calendar screen and select the saved query from the Queries drop-down list.

For more information about queries, see Chapter 9, "Using Query to Locate Information."

Printing Your Calendar

You can print your calendar in various formats. You can also access calendar reports from the Calendar screen. For more information about reports, see "Running Reports" on page 102.

If you are using Internet Explorer, you must make sure your Internet options are set up properly or the calendar will not print properly. See "Setting Internet Explorer Options for Calendar Printing" on page 16 for instructions.

To print your calendar

1. Navigate to the Calendar screen.
2. Click the Daily, Weekly, or Monthly tab, depending on which activities you want to print, and click Print.

   The Select Printing Format dialog box appears.

   NOTE: The options shown in the Select Printing Format dialog box change depending on which calendar you are printing from. From the Weekly calendar, you select This Week's Activities; from the Monthly calendar, you select This Month's Activities.

3 Decide which action to take based on the information in the following table:

Active Calendar Tab	Click this option button...	To print...
Daily	Today's Activities (Calendar Format)	The calendar as you see it for the day.
	Today's Activities (List Format)	A report of your activities.
Weekly	This Week's Activities (Calendar Format)	The calendar as you see it.
	This Week's Activities (List Format)	A report of your activities for the week.
Monthly	This Month's Activities (Calendar Format)	The calendar as you see it.
	This Month's Activities (List Format)	A report of your activities for the month.

TIP: Select landscape mode when printing weekly or monthly reports using the Calendar Format option. This will optimize the appearance of the reports.

4 Click Run.

15 Customizing Home Pages

Use the controls that appear in the upper right corner of each list and form to change the layout of your application home page. The changes you make to the layout using these controls, described in Table 20, remain in effect until you change the layout again.

Table 20. Home Page Controls

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

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

To use the Edit Layout function

1. At the home page, click Edit Layout.
2. In the Edit Layout form, make your changes by clicking the different controls that appear on each list or form:

Click	To
—	Collapse the list or form to its minimal size showing no records.
▭	Expand the list or form to its standard size.
↑	Move the list or form up on the page to reposition it above other lists and forms on the page.
↓	Move the list or form down on the page to reposition it below other lists and forms on the page.

Click	To
✕	Hide the list or form in the home page.
✓	Show a previously hidden list or form and place it back on the home page.

3. To apply the same action to all forms and lists at the same time, click the menu button and click one of the options described in the following table.

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

4. Click Done.

   The home page appears with the layout you defined.

16 Setting User Preferences

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

Topics in This Section

"About User Preferences" on page 142

"Setting Time Zone Preferences" on page 142

"Setting a Startup View" on page 142

"Setting Quick Print Options" on page 143

"Setting Outbound Communications Preferences for Send Email" on page 145

"Setting Search Preferences" on page 147

"Setting Up Default Queries" on page 148

"Viewing Saved Queries" on page 148

"Changing Default Spell Check Options" on page 149

"Customizing Aspects of the Message Bar" on page 150

"Setting Up View Links for Screen Home Pages" on page 151

"Showing, Hiding, and Reordering Screen and View Tabs" on page 152

"Customizing Aspects of the Calendar" on page 153

"Maintaining Quick Fill Templates" on page 157

"About Setting Up Synchronization Preferences" on page 159

"About Status Fields in the Profile View" on page 159

About User Preferences

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 your Siebel application.

Setting Time Zone Preferences

You can specify which time zone 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 > User Preferences.

   The User Preferences screen appears.

2. On the link bar, click Profile.

   The Profile form appears.

3. In the Time Zone field, click the select button.

   The Pick Time Zone dialog box appears.

4. Select the desired time zone and click OK.

   NOTE: In order for calendar alarms to work correctly, make sure that your computer's time zone setting is the same as the time zone you select in Step 4.

Setting a Startup View

If you want, you can determine which screen and view appears when you launch your Siebel application.

To set a startup view

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

   The User Preferences screen appears.

2. On the link bar, click Behavior.

   The Behavior form appears.

3. In the Startup View field, click the select button.

   The Pick Favorite dialog box appears.

4 From the Startup View list in the Pick Favorite dialog box, select the screen and view you want to have for your startup view.

For example, choosing Accounts - Activities will show the Accounts screen > Activities view when you first launch your Siebel application.

5 Click OK.

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

Setting Quick Print Options

The quick print function uses your Web browser's print functionality to print the records currently shown in a list. You can also use Microsoft Excel as your quick print application. Quick print settings are defined in the User Preferences screen > Printing view.

To set up quick print options

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

The User Preferences screen appears.

2 On the link bar, click Printing.

The Printing form appears.

3 Complete the fields as needed to set up printing the way you want it.

Some fields are described in the following table.

Field	Description
General Behavior	
Application Menu - Print Behavior	Determines how on screen data prints when you use the application-level menu (File > Print). (Applies only to HTML. If you use Microsoft Excel only the list will be printed.) Choose from the following options: ■ **All Applets in View.** Prints each list or form sequentially, left to right and top to bottom. ■ **Selected Applet Only.** Prints only the selected list or form.
Applet Menu - Print Behavior	Determines how on screen data prints when you use the menu button (Menu > Print). Choose from the following options: ■ **All Applets in View.** Prints each list or form sequentially, left to right and top to bottom. ■ **Selected Applet Only.** Prints only the selected list or form.

Field	Description
List Behavior	
Print Individual Lists Using	Choose from the following options: ■ **Microsoft Excel.** If you want to print only list applets. ■ **HTML.** If you want to print an entire view.
Rows to Print	Choose from the following options to determine how you want rows to print: ■ All Rows in Current Query ■ Selected Row(s)
Columns to Print	Choose from the following options to determine how you want columns to print: ■ All ■ Visible Columns

To select Microsoft Excel as your quick print application

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

   The User Preferences screen appears.

2. On the link bar, click Printing.

   The Printing form appears.

3. From the Print Individual Lists Using drop-down list, choose Microsoft Excel.

To select the Web browser's print function as your quick print application

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

   The User Preferences screen appears.

2. On the link bar, click Printing.

   The Printing form appears.

3. From the Print Individual Lists Using drop-down list, choose HTML.

Related Topics

"Changing Browser Security Levels" on page 16

"Printing Records" on page 58

Setting Outbound Communications Preferences for Send Email

This topic describes how to set user preferences that affect the Send Email command.

For information about supported versions of Microsoft Outlook and Lotus Notes email client software, see the system requirements and supported platforms documentation for your Siebel application.

To set outbound communications preferences for Send Email

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

   The User Preferences screen appears.

2. On the link bar, click Outbound Communications.

   The Outbound Communications form appears.

3 Under Send Email, complete the fields using the following table that describes some of the fields.

Field	Description
Upon Sending Messages Generate	Specifies 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, so that 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, so that the activity record can be viewed by other users, in addition to the message sender. The specific results of the Internal flag being set to FALSE or TRUE depend on your Siebel implementation. Consult your Siebel administrator for more information.
Default Profile	Specifies the default communications profile for a user 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 software and the email/fax server. For example, a profile for the Internet SMTP/POP3 Server driver handles outbound communications using the SMTP protocol. You have access to any profiles that are associated with your Siebel responsibility setting, and to 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 windows. You can specify a different profile by choosing another value from the drop-down list for the From field.
Default Recipient Class	In some contexts, the Send Email and Send Fax commands let you choose email or fax recipients from data stored in certain fields of the current record. If you choose a recipient based on one of these current field values, the Default Recipient Class setting specifies the default choice for where recipient email or fax address information will be populated in the outbound message. Choices are To, Cc, and Bcc. For example, you might generally want to populate recipients to the To field. However, depending on your typical activities or workflow and on your company's business needs, it may be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.

Field	Description
Email Client	Determines which of the following will be used when the Send Email command is selected: ■ Send Email window for Siebel applications ■ Microsoft Outlook email client ■ Lotus Notes email client
Siebel/Outlook Form	Specifies the user's preferred outbound email form when Email Client is set to Microsoft Outlook, if the user prefers a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see *Siebel Communications Server Administration Guide*.
Siebel/Lotus Form	Specifies the user's preferred outbound email form when Email Client is set to Lotus Notes, if the user prefers a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see *Siebel Communications Server Administration Guide*.
Default Message Format	Specifies the type of formatting to use for outbound email messages that are sent using the Send Email command. Available values are HTML and Plain Text. For more information about using the HTML message format, see "Using the HTML Editor" on page 104.

Related Topic

"Using the Send Email Command" on page 103

Setting Search Preferences

Before you set search preferences, you should contact your Siebel administrator to find out how Search is set up in your Siebel application.

To set search preferences

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

   The User Preferences screen appears.

2. On the link bar, click Search.

   The Search form appears.

3. Make your changes in the Search Settings and Search Term Separator drop-down lists.

   NOTE: Contact your Siebel administrator for information about the Search Settings values. The default Search Term Separator is OR.

4. To define the proximity of searches that include the NEAR operator, type a number in the Proximity Search field.

   For example, to find items within 5 characters of each other when you use the NEAR operator between search terms, type 5 in this field.

Setting Up Default Queries

Using the Default Queries tab in the User Preferences screen, you can set up queries to appear when you access a specific screen and view. For more information on queries, see Chapter 9, “Using Query to Locate Information.”

NOTE: Only views which can be accessed from the Show drop-down list or the Site Map can have a default query associated with them.

To set up a default query

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

   The User Preferences screen appears.

2. On the link bar, click Default Queries.

   The Screen Name and Screen View lists appear.

3. In the Screen Name list at the top of the screen, select the desired screen.
4. In the Screen View list below the list of screens, select the desired view from the View Name column.
5. Click the Default Query field next to the view you selected, and click the select button.

   The Pick Query dialog box appears.

6. From the Pick Query dialog box, select the query you want this view to display, and click OK.

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

Viewing Saved Queries

Using the Saved Queries tab in the User Preferences screen, you can perform a query on existing saved queries that you saved previously. For more information on queries, see Chapter 9, “Using Query to Locate Information.”

To view a saved query

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

   The User Preferences screen appears.

2. On the link bar, click Saved Queries.

   The Saved Queries list appears.

Changing Default Spell Check Options

Siebel Spell Check can be used with the Send Email, Send Fax, Send Page, and Send Wireless Message features. You can change your Spell Check default language in user preferences.

You can add words to a custom dictionary. Custom user dictionaries are stored on the server so you can use any available workstation and still have access to the entire dictionary.

You can set up Spell Check to run automatically on any email messages, faxes, pages, and wireless messages that you send from the Siebel application. For more information about spell checking, see "Spell Checking Fields" on page 64.

To change default spell check options

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

   The User Preferences screen appears.

2. On the link bar, click Spelling.

   The Spelling form appears.

3. In the Spelling form, make the necessary changes using the information in the following table.

Field	Description
Ignore UPPERCASE Words	When off (check box cleared), spell check questions words in all caps, such as SMTP or CD and asks whether they are correct.
Ignore MixedCase Words	When off (check box cleared), spell check questions words such as eMail and asks whether they are correct.
Ignore Internet Names	When off (check box cleared), spell check questions words such as support@siebel.com and http://www.siebel.com/
Report Capitalization Errors	When on, spell check questions capitalization errors such as PLEase.
Ignore HTML Tags	When on (check box selected), spelling is not checked for any text enclosed in angle brackets (<>) or any text that follows an unmatched left angle bracket (<).
Ignore Words with Digits	When off (check box cleared), spell check does not question words such as POP3.
Always Check Spelling Before Sending	When off (check box cleared), spell check does not check the spelling of the email body when you click Send.
Default Spell Checking Language	The current default language dictionary used to check spelling. The initial default language is the language specified during the Siebel system installation. You may change your default language at any time. A new default spell checking language will take effect the next time you invoke spell checking.

Customizing Aspects of the Message Bar

You can customize the behavior of the scrolling message bar that appears at the bottom of the application window from the Message Broadcasting tab in the User Preferences screen.

To customize your message bar

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

   The User Preferences screen appears.

2. On the link bar, click Message Broadcasting.

   The Message Broadcasting form appears.

3. Edit the fields as desired. The following table describes the functionality of each field.

Field	Description
Scroll Speed	Choose a speed at which messages will scroll across the bottom of the application window: Stopped, Slow, Medium, or Fast.
Arrow Scroll Speed	Choose a speed at which messages will scroll when you click the arrows at either end of the message bar: Stopped, Slow, Medium, or Fast.
Mouseover Pause Speed	Choose a speed at which the messages will scroll when your mouse cursor hovers over the message bar: Stopped, Slow, Medium, or Fast.
Update Interval (Seconds)	Enter the interval of time in seconds at which you want the message bar to refresh.
Prefix of Normal Priority Message	You can specify text to appear before a message. For example, you may want to have the letter N appear before a normal-priority message to let you know it is a normal-priority message. This is especially useful if you have trouble distinguishing the colors of these messages.
Prefix of High Priority Message	You can specify text to appear before a high-priority message. For example, you may want to have the letter H appear before a high-priority message to let you know it is a high-priority message. This is especially useful if you have trouble distinguishing the colors of these messages.
Prefix of Urgent Priority Message	You can specify text to appear before an urgent-priority message. For example, you may want to have the letter U appear before an urgent message to let you know it is urgent. This is especially useful if you have trouble distinguishing the colors of these messages.
Show	Select this check box to show the message bar in the application window. To hide the message bar, clear this box.

Related Topic

"About the Message Bar in the User Interface" on page 36

Setting Up View Links for Screen Home Pages

Screen home pages are divided into five areas, as described in "About Screen Home Pages" on page 25. You can define which links appear in the view links area (middle of the screen).

Your Siebel administrator can set up view links for screen home pages and mark those links as public. In this case, 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 > User Preferences.

   The User Preferences screen appears.

2. On the link bar, click View Links.

   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, the View Links list shows those links.

4. In the View Links list, click New.
5. Complete the fields using the information in the following table.

Field	Description
Sequence	A number that determines the place of the link in the view links area of the screen home page.
Public	If selected, this is a public view link and you cannot modify or delete it.
Active	If selected, indicates that this is an active view link.
Name	Lets you type a name for the link.
Description	Lets you type a long description for the link.
View	Click the select button in this field to select a view in the Pick Screen View dialog box.
Default Query	Click the select button in this field to select a default predefined query for the view you selected in the View field.

Showing, Hiding, and Reordering Screen and View Tabs

You can show, hide, and resequence screen tabs and view tabs from the User Preferences screen. You can also set up default views for screens in your Siebel application.

The views available to you are always available through the Site Map, whether or not a view tab is hidden.

To show or hide screen tabs

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

   The User Preferences screen appears.

2. On the link bar, click Tab Layout.

   The Tab Layout list appears.

3. Select the row for the screen tab you want to show or hide and do one of the following:

   - Clear the Hide check box to show the screen tab.
   - Select the Hide check box to hide the screen tab.

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

To show or hide view tabs

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

   The User Preferences screen appears.

2. On the link bar, click Tab Layout.

   The Tab Layout list appears.

3. In the Tab Layout list, select the row for the screen tab associated with the view tab you want to show or hide.

   The View Tab Layout list shows the view tabs for the selected screen tab.

4. In the View Tab Layout list, select the row for the view tab you want to show or hide and do one of the following:

   - Clear the Hide check box to show the view tab.
   - Select the Hide check box to hide the view tab.

To change the order in which screen tabs appear

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

   The User Preferences screen appears.

2 On the link bar, click Tab Layout.

  The Tab Layout list appears.

3 In the Tab Layout list, select the row for the screen you want to reorder, and type a whole number in the Order field to define the position of the screen tab.

  If you use the same number in the Order field for more than one tab, the tabs with the same number will appear in alphabetical order. This applies to both screen tabs and view tabs.

To change the order in which view tabs appear

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

   The User Preferences screen appears.

2. On the link bar, click Tab Layout.

   The Tab Layout list appears.

3. In the Tab Layout list, select the row for the screen for which you want to reorder view tabs.

   The View Tab Layout list shows the view tabs for the selected screen.

4. In the View Tab Layout list, type a whole number in the Order field for each view tab to define the position of that view tab.

   The Order field defines the sequence of the tabs. The application uses the number in the Order field to resequence the tabs in ascending order. Use whole numbers only. This applies to both screen tabs and view tabs.

To set up a default view for a screen

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

   The User Preferences screen appears.

2. On the link bar, click Tab Layout.

   The Tab Layout list appears.

3. In the 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 to have as the default for this screen.

Customizing Aspects of the Calendar

To better suit your needs, you can customize aspects of your calendar from the Calendar tab in the User Preferences screen. For information on using the calendar, see Chapter 14, “Using the Calendar.”

Topics in This Section

“Changing the Length of the Calendar Day” on page 154

"Setting Up Default Calendar Activity Durations" on page 154
"Turning On Alarms for All Calendar Activities" on page 155
"Setting Up Default Alarm Lead Times" on page 155
"Setting Up Default Alarm Snooze Times" on page 155
"Setting Up Meeting Email Notification Prompts" on page 156
"Setting Up Default Calendar Views" on page 156
"Setting Up Another User's Calendar as Your Default Calendar" on page 157
"Setting Up Default Participant Availability Subviews" on page 157

Changing the Length of the Calendar Day

The Daily view in your calendar shows your default work day, but it may not reflect the hours you are actually at work. You can change the length of the calendar day from the User Preferences screen.

To change the length of the calendar day

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. Enter the desired calendar start time in the Working Hours Start At field.
4. Enter the desired calendar end time in the Working Hours End At field.

Setting Up Default Calendar Activity Durations

Each activity you schedule on your calendar has a default duration. You can determine the default from the User Preferences screen.

To set up a default calendar activity duration

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. Select the desired activity length from the Appointment Duration drop-down list.

Turning On Alarms for All Calendar Activities

Alarms notify users of upcoming activities. You can specify that an alarm will be triggered for every calendar activity you create.

To turn on default alarms for all calendar activities

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. Select the Default Alarm check box.

NOTE: Clear the Default Alarm check box to turn off alarms for all activities. This will affect only activities you create after you clear the Default Alarm check box.

Setting Up Default Alarm Lead Times

From the Calendar tab in the User Preferences screen, you can specify the time at which alarm notification takes place.

For information about alarm system preferences, see the section on system preferences in *Siebel Applications Administration Guide*.

To set the time when alarms appear

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. In the Alarm Lead Time drop-down list, select a time between 5 and 120 minutes.

   This is the time that all alarms will be triggered before an appointment or reminder.

Setting Up Default Alarm Snooze Times

You can set up one snooze time for all your alarms from the Calendar tab in the User Preferences screen.

To set up a default snooze time for all alarms

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar screen appears.

3. From the Snooze Period drop-down list, select a time between 15 and 120 minutes.

   This is the length of time that alarms will wait before triggering a second time after you snooze them.

Setting Up Meeting Email Notification Prompts

You may want to be prompted by the application to send email messages to meeting participants when you create a new appointment or modify an existing one.

To set up a participant email prompt

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. Select the empty Participant Email Prompt check box.

Setting Up Default Calendar Views

You can set up a default calendar view to appear every time you access the Calendar screen. For example, if you use the monthly calendar all the time, it will be helpful for you to have the monthly calendar set up as the default calendar view.

To set up a default calendar view

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar form appears.

3. From the Default Calendar drop-down list, choose Daily, Weekly, or Monthly.
4. If you selected Weekly as the Default Calendar, choose 5 Day Weekly or 7 Day Weekly from the Weekly Calendar View drop-down list to define the default weekly calendar view.

Setting Up Another User’s Calendar as Your Default Calendar

If you spend much of your time accessing another user’s calendar, you may 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 > User Preferences.

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar screen appears.

3. Click the Default User select button.

   The Pick Default User dialog box appears.

4. Select the appropriate user.
5. Click OK.

   That user’s login appears in the Default User field and that user’s calendar will appear as your default calendar in the Calendar screen.

Setting Up Default Participant Availability Subviews

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

To set up a default participant chart display

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

   The User Preferences screen appears.

2. On the link bar, click Calendar.

   The Calendar screen appears.

3. Choose Working Hours or 24 Hours from the Participant Chart Display drop-down list.

Maintaining Quick Fill Templates

Once you have created quick fill templates, you can change some of their properties, and you can inactivate or delete the templates.

You can only perform the tasks provided in this topic for quick fill templates you created.

To rename a quick fill template

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

   The User Preferences screen appears.

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

   The Templates list appears.

3. Select the template you want to rename.
4. In the Template Name field, type a new name for the quick fill template.
5. (Optional) In the Description field, make your changes.

To deactivate a quick fill template

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

   The User Preferences screen appears.

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

   The Templates list appears.

3. Select the template you want to inactivate.
4. In the Active field, clear the check box and save your changes.

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

To reactivate a quick fill template

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

   The User Preferences screen appears.

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

   The Templates list appears.

3. Select the template you want to reactivate.
4. In the Active field, select the empty check box and save your changes.

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

To permanently delete a quick fill template

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

   The User Preferences screen appears.

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

   The Templates list appears.

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

4 At the confirmation dialog box, click OK.

About Setting Up Synchronization Preferences

You can set synchronization preferences from the DB Synchronization tab in the User Preferences screen. These preferences include enabling auto synchronization, setting its frequency, and setting up auto synchronization reminders. For details on setting up synchronization preferences, see *Siebel Remote and Replication Manager Administration Guide*. For more information about basic synchronization, see Chapter 13, “Synchronizing Data.”

About Status Fields in the Profile View

The following fields in the Availability section of the Profile view in user preferences are informational only and have no logic associated with them: Current Status, Until, and Next Status.

17 Using Keyboard Shortcuts

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

Topics in This Section

"About Keyboard Shortcuts" on page 162

"About Modes of Operation for Keyboard Shortcuts" on page 162

"Keyboard Shortcuts" on page 162

About Keyboard Shortcuts

Keyboard shortcuts allow you to use sequences of keystrokes as an alternative to the mouse for executing commands and navigating through your 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 Web browser are also available for use in Siebel applications. For example, you can navigate sequentially through fields within the application views using TAB.

About Modes of Operation for Keyboard Shortcuts

Keyboard shortcuts are available in two modes: basic and extended. A shortcut can be specific to one mode or it can be common to both modes. A full set of keyboard shortcuts ships with Siebel applications. These shortcuts are defined in Siebel Tools. If you need to know which mode is implemented with your Siebel application, ask your Siebel administrator.

Extended Mode

Extended-mode keyboard shortcuts are the default mode of operation for Siebel applications. Extended-mode shortcuts can include any key sequence, including the ones already used by your Web browser. In a case in which the Siebel application and the Web browser use an identical key sequence, the extended Siebel shortcut wins, and the browser shortcut fails. Extended-mode shortcuts can include any special keys, such as function keys or arrow keys, in their key combinations.

To use extended-mode shortcuts, your browser must be configured to accept ActiveX controls. Your Siebel administrator may have already set up your machine to do this, or you may be prompted by a dialog box when you first log in to your Siebel application to accept a software download from Siebel Systems.

Basic Mode

Basic-mode keyboard shortcuts cannot include any key sequences already being used by your Web browser. In a case in which the Siebel application and the Web browser use an identical key sequence, the Web browser shortcut wins and the basic Siebel shortcut fails. Basic-mode shortcuts can use only standard keys, such as letters and numbers. If you are unsure which keyboard shortcuts to use, contact your Siebel administrator.

Keyboard Shortcuts

The shortcuts in the tables in this section are shown according to the actions they perform. The context column indicates where in the application each action would be used. Keyboard shortcuts are based on application context. If the corresponding command is not available in the application, the shortcut is not active.

Keyboard shortcuts can be grouped into categories. The keyboard shortcuts for each category appear below.

NOTE: The keyboard shortcuts described in this section come with the Siebel application provided by Oracle. If your Siebel administrator has reconfigured these shortcuts, your keyboard shortcuts will be different. Contact your Siebel administrator if you encounter any difficulties using your shortcuts.

Data Management Keyboard Shortcuts

Table 21 lists the keyboard shortcuts you can use when performing data management tasks.

Table 21. Data Management Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
New record	CTRL+ALT+N	CTRL+N	List, form
New record using Quick Fill template	CTRL+K		Form
New record using last used Quick Fill template	CTRL+J		Form
Apply Quick Fill template to record	CTRL+Q		Form
Copy record	CTRL+ALT+C	CTRL+B	Record
Save record	CTRL+SHIFT+S	CTRL+S	List, form
Delete record	CTRL+ALT+D	CTRL+D	Record
Undo record	CTRL+ALT+U -or- ESC	CTRL+U -or- ESC	Record
Select all	CTRL+ALT+A	CTRL+A	List
Invoke selection dialog box Open the calendar control Open the calculator control Open a drop-down list	CTRL+ALT+P	F2 or DOWN ARROW	Field

Record Navigation Keyboard Shortcuts

Table 22 lists the keyboard shortcuts you can use to navigate to records in the application.

Table 22. Record Navigation Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
Drill down into record	CTRL+SHIFT+SPACE (Cursor focus must be on the hyperlinked field.)		List
Go to previous record	CTRL+SHIFT+,	CTRL+UP ARROW	List, form
Go to next record	CTRL+SHIFT+.	CTRL+DOWN ARROW	List, form
Go to previous record set	CTRL+ALT+,	ALT+UP ARROW	List
Go to next record set	CTRL+ALT+.	ALT+DOWN ARROW	List
Go to first record	CTRL+ALT+F	ALT+F	List, form
Go to last record	CTRL+ALT+L	ALT+L	List, form

Query Management Keyboard Shortcuts

Table 23 lists the keyboard shortcuts you can use to work with queries.

Table 23. Query Management Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
New query	CTRL+ALT+Q	ALT+Q	List, form
Execute query	CTRL+ALT+ENTER	ALT+ENTER	List, form
Refine query	CTRL+ALT+R	ALT+R	List, form
Save query with different name	CTRL+ALT+S	ALT+S	List, form

General Navigation Keyboard Shortcuts

Table 24 lists the keyboard shortcuts you can use to navigate in the application.

Table 24. General Navigation Keyboard Shortcuts

Action	Basic Mode	Context
Go to Site Map	CTRL+SHIFT+A	Application
Go to application-level menu	CTRL+ALT+M	Application
Go back	ALT+LEFT ARROW	Application
Go forward	ALT+RIGHT ARROW	Application

Table 24. General Navigation Keyboard Shortcuts

Action	Basic Mode	Context
Go to screen tabs	CTRL+SHIFT+T	Application
Go to view tabs	CTRL+ALT+T	Application
Open menu button pop-up on list or form	CTRL+SHIFT+M	List, form
Go to next list or form	CTRL+SHIFT+]	Application
Go to previous list or form	CTRL+SHIFT+[	Application
Open Search Center	CTRL+SHIFT+F	Application
Open iHelp	CTRL+SHIFT+E	Application
Open Tasks	CTRL+SHIFT+Y	Application

Layout Management Keyboard Shortcuts

Table 25 lists the keyboard shortcuts you can use to change the appearance of lists in the application.

Table 25. Layout Management Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
Advanced sort	CTRL+SHIFT+O		List
Columns displayed	CTRL+SHIFT+K		List

Online Help Keyboard Shortcuts

Table 26 lists the keyboard shortcuts you can use to access options available on the application-level Help menu.

Table 26. Online Help Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
Display online help	CTRL+ALT+H	CTRL+H	Screen
Display information about record	CTRL+ALT+K		Application
Access technical support	CTRL+ALT+J		Application

Communication Management Keyboard Shortcuts

Table 27 lists the keyboard shortcuts you can use to share information with others.

Table 27. Communication Management Keyboard Shortcuts

Action	Basic Mode	Extended Mode	Context
Send letter	CTRL+SHIFT+L	CTRL+L	Record
Send email	CTRL+ALT+1	F9	Record
Send fax	CTRL+ALT+2	CTRL+F9	Record
Send page	CTRL+ALT+3	SHIFT+F9	Record
Send wireless message	CTRL+ALT+4	ALT+F9	Record

Application Management Keyboard Shortcuts

Table 28 lists the keyboard shortcuts you can use to perform general application activities.

Table 28. Application Management Keyboard Shortcuts

<table>
<tr><th>Action</th><th>Basic Mode</th><th>Extended Mode</th><th>Context</th></tr>
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<tr><td>Connect as new mobile user</td><td colspan="2">CTRL+SHIFT+W</td><td>Application</td></tr>
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