Siebel

Fundamentals Guide

April 2020



Siebel
Fundamentals Guide

April 2020

Part Number: F12738-04

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Authors: Siebel Information Development Team

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Accessible Oracle Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an email to: *oracle_fusion_applications_help_ww_grp@oracle.com*.

1 What's New in This Release

What's New in Siebel Fundamentals Guide, Siebel CRM 20.4 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Finding Information About Records	Modified topic. For List of Values in Siebel CRM Innovation Pack 2017 and later releases, the Row ID for a record corresponds to the WS_SRC_ID (workspace source ID).

What's New in Siebel Fundamentals Guide, Siebel CRM 20.1 Update

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 Guide, Siebel CRM 19.4 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Default Navigation Control	New topic. This component parameter allows the Web client application to start with the preferred navigation control, which can be one of the following: • NAVIGATION_SIDE (the default setting) • NAVIGATION_TAB • NAVIGATION_TREE
How Siebel CRM Handles Wildcard Search	Modified topic. The AutomaticWildcardSearch system preference is new.

What’s New in Siebel Fundamentals Guide, Siebel CRM 19.1 Update

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

2 Accessibility

Oracle's Siebel Business Applications are designed to meet the needs of users with disabilities, and conform to many of the guidelines specified by the Web Content Accessibility Guidelines (WCAG) 2.0.

Oracle is committed to improving support for accessibility features and uses popular WAI-ARIA compliant assistive technologies, such as screen readers, speech synthesizers, and alternative keyboards to test applications.

Oracle provides a large number of keyboard shortcuts (also known as access keys or hot keys) to enable all users to navigate Siebel CRM elements, such as applets and records, without using a mouse in addition to supporting those provided by screen readers.

For more information about Oracle's Accessibility Program, visit the Web site at: *http://www.oracle.com/accessibility/*

This chapter provides information about accessibility in your Web application. It includes the following topics:

- *Accessibility in Web Applications*
- *Keyboard Navigation in Accessible Rich Internet Applications*
- *Utilities for Visually Impaired Users*
- *Utilities for Physically Disabled Users*

Related Topic

Keyboard Navigation and Shortcuts

Accessibility in the Web Application

Where possible and practical, the design of your Web application meets the Web Content Accessibility Guidelines (WCAG) 2.0 AA level and US Section 508. Oracle shows leadership in not only attempting to meet mandates, but in providing very practical and usable business solutions for business users and consumers that require accessibility features. Accessibility is always enabled and requires no special tasks for users. No action is required to enable accessibility features outside of availability of appropriate assistive technology.

In order to address these accessibility standards, your Web application relies on the WAI-ARIA coding techniques (Web Accessibility Initiative - Accessible Rich Internet Applications). One example of WAI-ARIA that has been implemented are Regions, which allow users to navigate to various parts of a page such as the Menu, Toolbar and Applets using keyboard shortcuts provided by assistive technology that has also implemented WAI-ARIA.



Note: To fully leverage Accessibility in Web applications, end users must use browsers and assistive technologies that have implemented WAI-ARIA. Only a subset of accessibility features is available without support of WAI-ARIA.

For information about WCAG 2.0, visit the following website: *http://www.w3.org/WAI/*

For information about US Section 508, visit the following website: *http://www.section508.gov/*

Keyboard Navigation in Accessible Rich Internet Applications

Your Web client application supports Accessible Rich Internet Applications (ARIA). ARIA define a way to make Web content and Web applications more accessible for people with disabilities and easier to use for all users. ARIA especially help in navigating within dynamic content and in using advanced user interface controls developed with Ajax, HTML, JavaScript, and related technologies.

ARIA include a collection of common, semantic landmarks that apply to each navigable region in an application. These landmarks allow a person with disabilities to use an assistive-technology product, such a screen reader, to navigate in an application. Landmarks provide a consistent navigation experience in which a pointing device, such as a mouse, is unnecessary.

Examples of landmarks include: the application-level menu, the application toolbar, screen names, view names, lists, visibility filters, and forms. If you use a JAWS screen reader, press `CTRL + INSERT + ;` (semicolon) to display a dialog box that describes the landmarks.

For information about ARIA, visit the Web Accessibility Initiative website: *http://www.w3.org/WAI/*

Utilities for Visually Impaired Users

In your Web client application, people with visual impairment can use screen magnification utilities to enlarge selected text and other on-screen elements for easier viewing. Several operating systems supply magnification utilities. You can also purchase these utilities from third-party vendors.

Your Web client application supports magnification utilities that work in browser-based applications. In your Web client application, people with visual impairment can use zoom features and high-contrast options for browsers to facilitate viewing.

Screen Readers

Your Web client application supports screen readers that work in browser-based applications. Screen readers provide an audible description of the field contents as you navigate through the user interface. It is recommended that you use screen readers that support Accessible Rich Internet Applications (ARIA).

Your Web client application supports screen readers that are browser-compatible because it is a standards-based Web application. Some browsers interpret Accessible Rich Internet Applications (ARIA) and Web Content Accessibility Guidelines (WCAG) 2.0 better than other browsers. Use the appropriate browser for your implementation. Consult with the vendor for your screen reader to use it with your Web application.

If you use a screen reader, then you hear the levels of the bar region that denote user interface areas. The following table shows which level of the bar region corresponds to each user interface area that sighted users work with.

Level of Bar Region	User Interface Area
First level	One of the following: • The list that appears when you click the Side Menu. • The screen tabs that appear across the screen, at the start of a page. • The screen names that appear in tree format on the side of the screen.
Second level	One of the following: • The views that appear in the second level view bar. • The views that appear in a link bar under the screen tabs. • The view names that appear in tree format on the side of the screen.
Third level	One of the following: • The views that appear in the third level view bar. • The view tabs that appear lower on the screen.
Fourth level	One of the following: • The subviews that appear in the fourth level subview bar. • The subviews that appear in a link bar under the view tabs lower on the screen. • The subviews that appear when you hover the cursor over a view tab lower on the screen.

Utilities for Physically Disabled Users

In your Web client application, people with physical disabilities can use utilities, such as soft keyboards, voice control, and StickyKeys, to work with data. The keyboard-usage model for the Web application client recognizes these utilities. For more information about using these utilities in browser-based applications, consult the vendor for the utility or the vendor for the operating system.

3 Getting Started with Your Application

Getting Started with Your Application

This chapter describes how to get started with your Web applications, including Self Service applications, from Oracle. It includes the following topics:

- *Logging In to the Application*
- *Logging Out of the Application*
- *Native Browser Features*
- *About Access and Responsibilities in the Siebel Application*
- *Getting Started with Self Service Applications*
- *Locale Support*

Logging In to the Application

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

To log in to the application

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

   A login screen appears.

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

2. Enter your user ID and password.

   Contact your administrator if you are not sure of your user ID or password.
3. (Optional) Click the HTML5 Browser Compatibility link on the login screen to show your browser's compatibility with HTML5 features.

   HTML5 is a core technology markup language of the Internet used to structure and present content on the Web. If an HTML5 feature is not compatible with your browser, then you can click the question mark icon to review more information about that feature and about the limitations that you might experience in your application because of this incompatibility.
4. Click Login.
5. If the Browser Check dialog box appears, then follow the on-screen instructions.

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

Application Home Page

After you log in to the application, the home page appears. The home page shows items that are most useful to you while you use the application. For example, the 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 the 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 administrator. For more information about how the records in these lists are filtered, contact your administrator.

Demo Version of Siebel Application

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

Logging Out of the Application

When finished using the Web client application, you exit it.

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

To log out of the application

- Complete either of the following steps:
  - From the application menu, choose File, then Log Out.
  - Click Settings on the application toolbar, and then click Log Out.

Closing the Browser

Clicking Close (X) in the upper corner of a window rather than explicitly using the Log Out button to exit a browser is not supported. It is recommended to set session time out intervals as short as possible while maintaining usability, and to train users to log out of the application by using the Log Out button.

Native Browser Features

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

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

Use the zoom feature in your browser to control how you see screen content, and use the print feature in your browser to print records. For more information, see *Printing Records*.

Your application uses the native spell checking capabilities provided by your browser.

To refresh data in your application, it is recommended that you use the query functionality.

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

About Access and Responsibilities in the Siebel Application

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

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

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

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

The following factors can determine the records you see:

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

Getting Started with Self Service Applications

Self Service applications provide a website where customers can access service information. Customers must register on the Self Service website and then log in to use the website. Once registered and logged in, customers can view more details on the website by clicking and drilling down on links.

To make Siebel Self Service applications available to your customers, you must integrate Siebel Self Service with your company website by doing the following:

- Installing Siebel Self Service
- Deploying, configuring, and administering Siebel Self Service as an integrated part of your company website.

For more information about installing and deploying Siebel Self Service, see *Siebel eService Administration Guide for Siebel Open UI* .

Registering on the Self Service Website

If you do not register on the Self Service website, then you will only be able to access limited functionality on the website. After registration, you must provide personal and contact information about yourself, and create a user name and password for yourself. When you access the site again, you must enter this user name and password to log in to the site so that you can access additional functionality that is unavailable to customers who do not register.

To complete the registration process, you must enter data in all the fields in the registration form that have an asterisk (a star icon). At any time during this process, click Cancel to stop the process and not create a registration record.

Customers can register on the Self Service website only after administrators configure the LDAP security adapter for user authentication. For more information about configuring the LDAP security adaptor, see *Siebel Security Guide* .

To register on the Self Service website

1. Click the Create an account link in the Log In applet on the home page.
2. In the User Registration view that appears, enter the appropriate data in the form fields.
3. Review the terms and conditions for using the site, and select the check box after the form to indicate that you agree with the terms and conditions.
4. Click Register.

   The home page appears again.

Logging In to the Self Service Website

After you register on the Self Service website, you can log in to the website to access additional functionality.

To log in to the Self Service website

1. Enter the user name and password in the Log In applet on the home page.
2. (Optional) Click the HTML5 Browser Compatibility link in the Log In applet to show your browser's compatibility with HTML5 features.

   HTML 5 is a core technology markup language of the Internet used to structure and present content on the Web. If an HTML5 feature is not compatible with your browser, then you can click the question mark icon to review more information about that feature and about the limitations that you might experience in the application because of this incompatibility.
3. Click Log In.

   The home page appears again.

Logging Out of the Self Service Website

If you log in to the Self Service website, then log out of the website after you finish using the available functionality.

To log out of the Self Service website

1. Click Settings in the upper corner of any page.
2. Click Logout.

   The home page appears.

Obtaining a New Password for Self Service Applications

As a registered customer, you can obtain a new password if you forget your password. Self Service automatically creates a new password for you, and you can change this password after you use it to log in to the Self Service website.

To obtain a new password for the Self Service website

1. Click the Forgot Your Password link in the Log In applet on the home page.

   The Forgot Password form appears.
2. Enter information in the form, and click Submit.

   The Challenge Question form appears.
3. Enter information in the form, and click Submit.

   If your answer to the challenge question is correct, then a screen with a temporary password appears.
4. Note your temporary password, and click Close.

The home page appears again.

Locale Support

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

4 User Interface Overview

User Interface Overview

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

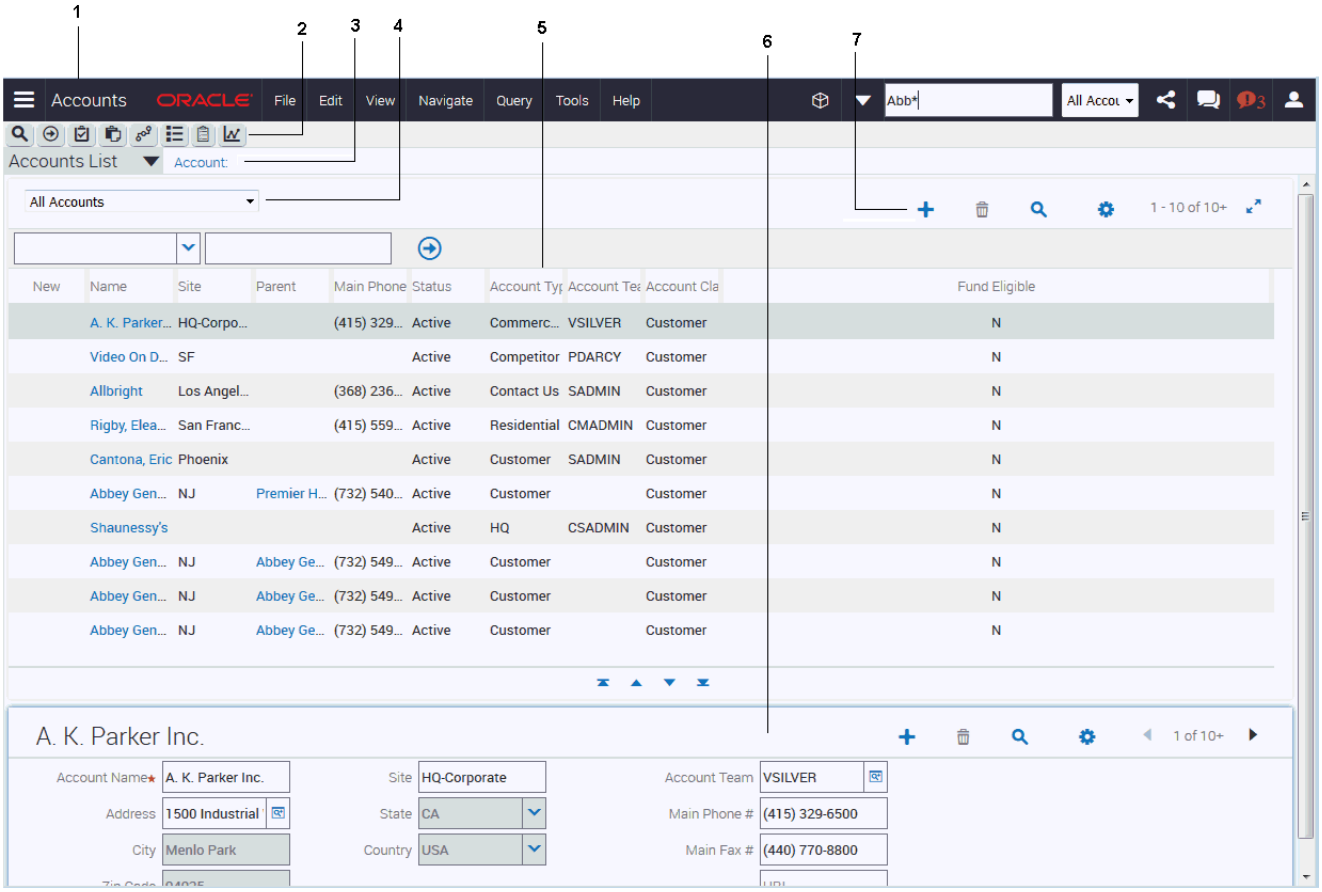
- *Elements of the Application Window*
- *Application Banner*
- *Application Taskbar*
- *Second Level View Bar*
- *Visibility Filter*
- *List*
- *Form*
- *List and Form Toolbar*
- *Sending Messages*
- *Communications Panel*
- *Site Map*
- *Application Screens*
- *Action Pane*
- *Explorer Views*
- *Application User Interface Behavior*

Elements of the Application Window

The following image shows the main elements of an example application window using the default web application UI theme. Typically, the main elements of the application window are:

1. *Application Banner*, which contains the following elements: side menu, application-level menu, and application toolbar.
2. *Application Taskbar*, which contains the following options: New Query, Execute Query, Apply Target List, Save Target List, Site Map, How Do I, Tasks, Reports.
3. *Second Level View Bar*, which appears immediately after the application taskbar.
4. *Visibility Filter*, which appears on a screen or view in the application (provided a visibility filter is available for the screen or view).
5. *List*, which consists of multiple records presented as rows.
6. *Form*, which typically appears after a list and contains the data for the record you select in the list.
7. *List and Form Toolbar*, which appears on lists and forms.

These elements are highlighted in the following image.



Application Banner

The application banner, shown in the following image and in *Elements of the Application Window*, persists for all views. The following items are available on the application banner:

1. *Side Menu*
2. *Application-Level Menu*
3. *Application Toolbar*



Side Menu

The side menu is the first item located on the *application banner*. It is characterized by three horizontal lines stacked on top of one another. Click Side Menu to view a list of available screen names.

Application-Level Menu

The application-level menu is located on the *application banner* and might include the following menu options: File, Edit, View, Navigate, Query, Tools, and Help.

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

Application Toolbar

The application toolbar is located on the *application banner* and includes the toolbar controls described in the following table.

Control	Name	Type	Description	Related Information
	Advanced Options	Drop-down list	Click the down arrow to access advanced search options.	*Information Search*
	Search Toolbar	Text box	Click in the empty single text field to perform a basic search.	*Information Search*
	Saved Queries	Drop-down list	Click the down arrow to access contextual saved queries.	*Information Query*
	Share	Button	Click to send email messages, faxes, pages, and outbound wireless messages.	*Sending Messages*

Control	Name	Type	Description	Related Information
	Communications	Button	Click to open the communications panel.	*Communications Panel*
	Notification	Button	Click to open the Notification pane to read notifications.	*Notifications*
	Settings	Button	Click to change application behavior settings, such as, startup view or navigation control.	*User Preferences*

Application Taskbar

The application taskbar, shown in *Elements of the Application Window*, appears after the application banner in the application window. The following table describes the controls available on the application taskbar.

Control	Name	Description	Related Information
	New Query	Starts a query.	*Information Query*
	Execute Query	Executes a query.	*Information Query*
	Apply Target List	Applies a target list to a view.	Contact your administrator and see *Siebel Applications Administration Guide* .

Control	Name	Description	Related Information
	Save Target List	Creates a target list.	Contact your administrator and see *Siebel Applications Administration Guide* .
	Site Map	Displays the Site Map.	*Site Map*
	How Do I	Accesses iHelp, which provides guidance for tasks.	*iHelp*
	Tasks	Activates a Task UI wizard to guide you through a series of steps to complete a specific task.	*Task UI*
	Reports	Accesses reports for the screen you are working in.	*Running Reports*

Second Level View Bar

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

An example of a second level view bar is shown in *Elements of the Application Window*. You access a second level view by clicking the drop-down arrow in the second level view bar and then clicking the view name.

The name of the active view is highlighted (or selected) in the list. If the name of the view you want to use is not visible, then use the scroll bar on the side of the list to scroll down to the view name.

You can configure your application to show the object names for the second level view bar in a link bar under screen tabs across the start of the screen, or in tree format on the side of the screen. For more information, see *Navigation Controls*.

Third Level View Bar

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

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

The name of the active view is highlighted (or selected) in the list. If the name of the view you want to use is not visible, then use the scroll bar on the side of the list to scroll down to the view name.

You can configure your application to show the names for the third level view bar in tab format lower on the screen. For more information, see *Navigation Controls*.

You can specify the third level views that appear in your application. For more information, see *Showing, Hiding, and Reordering Screens or Views*.

Fourth Level Subview Bar

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

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

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

You can configure your application to show the names for the fourth level subview bar in a link bar under the view tabs lower on the screen or when you hover the curser over a view tab lower on the screen. For more information, see *Navigation Controls*.

Visibility Filter

An example of a visibility filter is shown in *Elements of the Application Window*. For information about using the visibility filter, see *Using the Visibility Filter in Lists*.

List

A list consists of multiple records, presented as rows. An example of a list is shown in *Elements of the Application Window*.

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

In a list, you navigate and scroll vertically or horizontally to view data. For information about determining the number of records in a list, see *Displaying Record Count*.

Using the Visibility Filter in Lists

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

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

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

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

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

Navigating Between Records in Lists

Use the navigation buttons that appear after a list to navigate between the records in the list. The following table describes the navigation buttons.

Button	Name	Description
	First Record Set	Navigates to the first record set.

Button	Name	Description
	Previous Record Set	Navigates to the previous record set.
	Next Record Set	Navigates to the next record set.
	Last Record Set	Navigates to the last record set.

Note: There is no Go to First record or Go to Last record navigation option. It is recommended that you use Search to reduce the size of and filter data sets.

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

Horizontal Scrolling in Lists

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

Expanding and Collapsing Lists

Every list has a show more (expand) button or a show less (collapse) button in the corner. Click Show More or Show Less to see more or fewer records in a list. The following table describes the show more and show less buttons.

Button	Name	Description
	Show More	Displays more records to expand a collapsed list.

Button	Name	Description
	Show Less	Displays fewer records to collapse an expanded list.

Form

A form that appears after a list contains the data for the record you select in the list. Also, when you drill down on a field in a record in a list, you see a form on-screen that contains data for the record you drill down on. A form contains the data for one record. An example of a form is shown in *Elements of the Application Window*.

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

In some cases, you can click the show more button to access a long form, and then click the show less button to access the short form. These buttons appear in the corner of the form. For examples of the show more and show less buttons, see *Expanding and Collapsing Lists*.

Record navigation buttons are available on each form. Use the navigation buttons to navigate to the next and previous form records.

The record number for a form appears between the record navigation buttons. The record number changes as you navigate between forms. An estimate of the total number of form records appears beside the record number (for example: 7 of 10+). You must navigate to the last form to see the exact number of form records beside the record number (for example: 15 of 15).

List and Form Toolbar

A toolbar appears on lists and forms.. An example of the list and form toolbar is shown in *Elements of the Application Window*. The following table describes the typical icons that appear on the toolbar. Your application might contain additional icons or other elements on each list or form toolbar.

Button	Name	Description
	*Screen* Menu	Click Menu (the cogwheel icon) to access a menu of options that apply to the active form, list, explorer view, or selected record in a list. Using the options in the menu, you can perform actions such as copying, deleting, and advanced sorting.
	New or Add	Click New or Add (the plus (+) icon) to create a record or add an existing record. In a list, clicking New inserts a row at the start of the list so you can create a record. In a form, clicking New displays a form with empty fields that you can fill in to create a record.

Button	Name	Description
		Clicking Add opens a list from where you make further selections.
	New	Click New (the double plus (++) icon) to create a record. In a list, clicking New inserts a row at the start of the list so you can create a record. In a form, clicking New displays a form with empty fields that you can fill in to create a record.
	Save	Click Save (the arrow-pointing-to-a-box icon) to save the selected record.
	Cancel	Click Cancel (the arrow-pointing-up-and-back icon) to cancel modifications to the selected record.
	Delete	Click Delete (the trash can icon) to delete the selected record.
	Query	Click Query (the magnifying glass icon) to start a query in a form or list so that you can specify query criteria. For more information about querying, see *Information Query*.

Sending Messages

You can send messages by clicking Share on the *application toolbar*. Alternatively, you can send messages by choosing File on the application-level menu. For more information, see *Emailing, Faxing, Paging, and Sending Outbound Wireless Messages*.

After you click Share on the application toolbar, the following options for sending messages appear – these options are also shown in the following image:



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

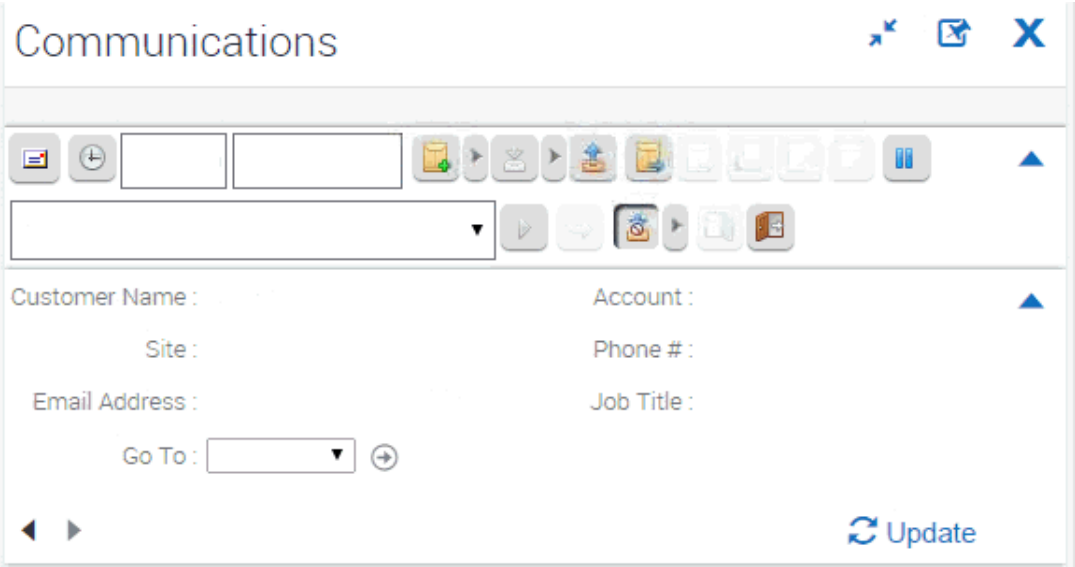
- **Fax messages.** Click to send fax messages. On some screens, the Pick Recipient dialog box might appear. After you select a recipient in the Pick Recipient dialog box, and click OK, the Send Fax dialog box appears. You prepare the fax message in this dialog box, and then click Send.
- **Page messages.**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

Communications Panel

You can access the communications panel by clicking Communications on the *application toolbar* in your Web client application. The following image shows an example of the communications panel, which has the following elements:

- **Header area.** Contains the label Communications and the following buttons: Expand, Popup Out, and Close.
- **Communications toolbar.** Shows the available toolbar controls.
- **Customer dashboard.** Shows customer information, such as, name, account, site, email address, and so on.
- **Chat panel.** Shows the content of the chat message.

Depending on the deployment of your Web client application, the communications panel might not contain all of these elements.



The communications panel can appear in a docked position or as a floating pane in your client application. You can dock and undock it by clicking Dock or Undock. When the communications panel is floating (undocked), you can move and position it anywhere within the confines of the main application client area. In addition, you can do the following:

- Control the size of the communications panel by choosing a wide or narrow display for the panel.

- Modify the display of the communications toolbar by choosing to display more or less of the toolbar.
- Close the communications panel by clicking Close (X).

For more information about the communications panel and toolbar, see *Siebel CTI Administration Guide* . For more information about the chat panel and customer dashboard see *Siebel Chat Guide* . The following image shows an example of the communications panel.

Application Screens

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

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

You can configure your application to show the names for screens in tab format across the start of the screen, or in a tree format on the side of the screen. For more information, see *Navigation Controls*.

You can specify the screens that appear in your application. For more information, see *Showing, Hiding, and Reordering Screens or Views*.

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

Home Pages for Screens

A screen home page is a gateway to the common functions for that screen. The following table describes the main elements on screen home pages.

Element	Description
Frequently Viewed Screen name	An area that contains a list of links to the lists of data with which you most frequently work. This list can be a combination of predefined queries and visibility filters. For more information, see *View Links for Screen Home Pages*.
Recent Records	An area that contains a list of the last five records that you accessed (by drilling down on the record), created, or modified. Enables you to return to a recent record with a single click. Recent records are stored in your user preferences.
iHelp	Task area that contains a list of links to the most important tasks for the screen. When you drill down on a task, iHelp is launched to guide you through the completion of the task.
Search	Query area where you enter query criteria directly into the fields, and click Go to navigate directly to the list with your query results.

Element	Description
Add	Add area that you use to add new records. You complete the fields, and click Add & Go to add the record to the database and navigate directly to the form containing the new record you add.

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

Site Map

Your organization determines the screens that appear in the application window. These screens might be only a subset of the available screens. You access a screen by clicking Side Menu on the *application banner* and then selecting the screen name from the list of screen names. You can also use Site Map on the *application taskbar* to access the screen.

If the screen name that you want does not appear in the list of screen names for the Side Menu, then you can show that screen name with the other screen names so that you can easily access the screen. For more information about specifying the screens that appear in your application, see *Showing, Hiding, and Reordering Screens or Views*.

To see a list of all the screens available to you, use Site Map as shown in the following procedure. For information about specifying the screens that appear in your application, see *Showing, Hiding, and Reordering Screens or Views*.

To navigate to a screen using the Site Map

1. Do one of the following:
   - From the application-level menu, choose Navigate, then Site Map.
   - Click Site Map on the *application taskbar*.
2. (Optional) To restrict the hyperlinks that appear in the Site Map, enter appropriate text in the field for searching.
3. In the Site Map, click the hyperlink for the screen you want to navigate to.

   The Site Map displays the screen name and all the view names available in that screen.
4. Click a hyperlink to navigate to the screen or view.

Action Pane

The *action pane* is a user interface element that displays the task pane, the iHelp pane, and the Search pane. You can access the individual Action Pane controls in one of the following ways:

- Click the appropriate button on the *application taskbar*.

  These buttons include the How Do I button and the Tasks button.
- From the *application-level menu*, choose View, then Action Pane.

  The available menu items include iHelp and Tasks.

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

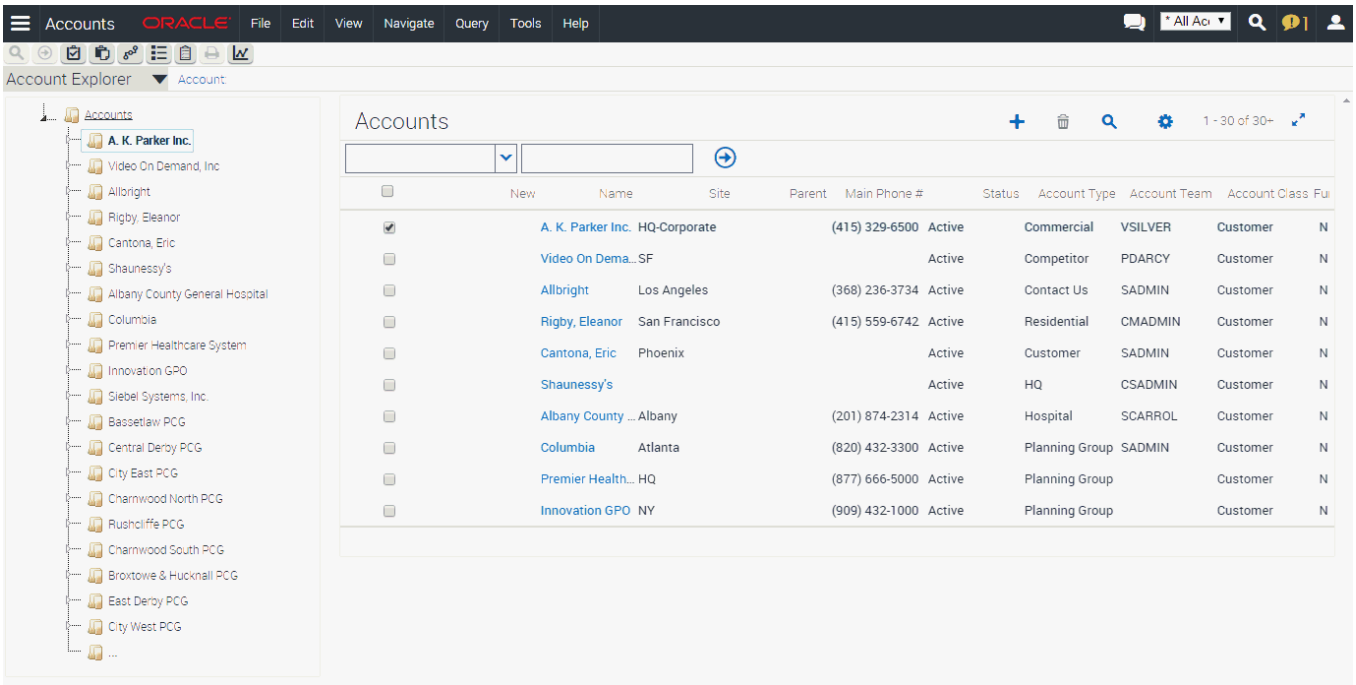
Explorer Views

The following image shows an example of an explorer view. An explorer view is an expandable tree view control, which displays data in a compact hierarchical format. The tree control appears in a side pane next to the main content area. Use the tree control as follows:

- Select a control for the tree branch that you want to view, and the detail information for that tree branch appears in the main content area.
- A folder in the tree preceded by an arrow contains other folders. Click the arrow to expand the folder and show its contents. Click the arrow to collapse the folder again. The list in the main content area always shows the contents of the selected folder in the tree control.

Typically, you can access an explorer view from the second level view bar.

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



Application User Interface Behavior

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

- **Lock.** The lock option is not supported in hierarchical list applets.
- **Pick lists and LOV's.** Pick lists and LOVs do not select a new value until a unique match is made. If you are using auto-fill but an exact match is not made, then the value reverts to the original. Double-quotes are not included when you select from an LOV.
- **Quotes.** Quotes are not included when you select an option from an LOV. Double quotes are required for strings.

5 Records, Fields, and Field Controls

Records, Fields, and Field Controls

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

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

Records

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

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

About Drilldown from the List View

Drilldown from the List view changes focus to the detail applet on the detail view. Since the focus is usually on the second applet (for example, detail activities), an attempt is made to show the entire applet. This might result in part of the title and some buttons in the title area being hidden. You can press Page Up to immediately see the previous applet header information or scroll using the mouse tablet or keyboard actions.

You can modify this behavior by doing the following:

- Reducing the number of rows displayed in the detail applet thereby allowing the view to render with everything visible initially.
- Changing the focus to the previous applet in the detail view by controlling the focus behavior. For more information about controlling the focus behavior, see article 1622877.1 (Doc ID) on My Oracle Support.

Related Topics

Horizontal Scrolling in Lists

Using Field Hyperlinks in Records

Organizing List Columns

Fields

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

Required Fields

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

Read-Only Fields

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

Maximum Number of Characters

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

Resizing the Notes Field

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

Text Fields

You can type text directly into a text field. You click in the field before typing this text.

To more easily enter text in text fields that can contain a large amount of text, you can click to select the resizing indicator in the corner of the field and then move the resizing indicator to make the field larger. You can also use

the resizing indicator to make the field smaller. In some browsers, you must click in the text field to see the resizing indicator.

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

Field Controls

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

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

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

Related Topics

Check Boxes

Option Buttons

Drop-Down Lists

Field Control Buttons

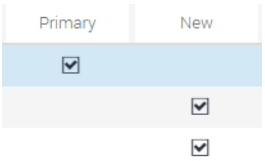
Check Boxes

Click the box beside or after an option to select or clear the check box. When you click an empty box, a check mark or an X appears in the box. If you click a box that is selected, then the check mark or X disappears.

In query mode, check boxes have a third possible state. For more information about using check boxes in query mode, see *Tips for Queries*.

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

The following image shows an example of check boxes.



Option Buttons

Option buttons, also called radio buttons, allow you to choose one of several options in a set. An option button appears empty when not selected, and full or filled in when selected. You cannot select more than one option button in a set.

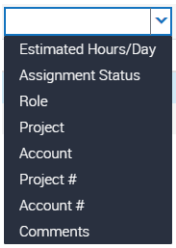
The following image shows an example of option buttons. On your keyboard, you can use the up or down navigation arrows and the space bar to select the option.



Drop-Down Lists

A drop-down list enables you to click a down arrow next to a field to select from a list of available values. You can type the field value in a field for drop-down list. You can also type part of the text string for a field value to automatically decrease the number of available values that appears in the drop-down list for the field, and then you can select the appropriate value for the field.

The following image shows an example of a drop-down list.



Field Control Buttons

The field control buttons appear in many fields. The following table describes these buttons. You use field controls to work with records in the application.

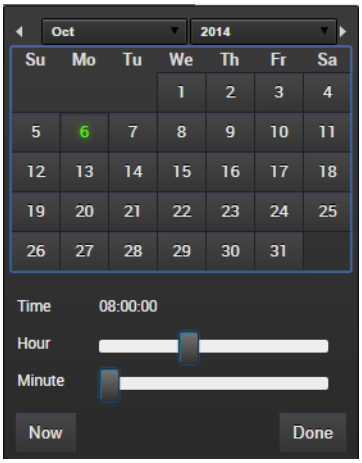
Button	Name	Description	Related Information
	Calculator	Launches a calculator for entering amounts.	*Calculator*
	Calendar select	Launches a calendar control for entering a date and optionally, time, in a date or date and time field. You can also type a date (or date and time) directly into a field.	*Calendar Control*
	Currency calculator	Launches the currency calculator.	*Currency Calculator*
	Multiple select	Launches a multiple selection dialog box.	*Associating Records Using a Multiple Selection Dialog Box*
	Single select	Launches a single selection dialog box.	*Associating Records Using a Single Selection Dialog Box*
	Telephone	Launches the default telephone application on for your device. This feature is device-dependent.	None

Calendar Control

You use the calendar control to select date and time information for a field. You access the calendar control by clicking the calendar select button in a date field or a date and time field.

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

The following image shows an example of the calendar control.



The following table describes each element of the calendar control.

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

The current date is not assumed as the default when using the calendar control. An explicit click is required to make a selection. Other things to note about selecting a date include the following:

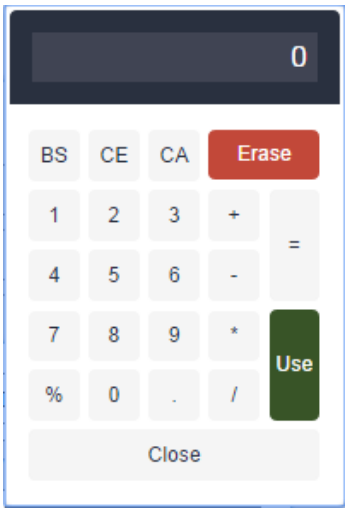
- When you query a date field that has a calendar select button to display the calendar control, then you must include the date field value in quotes if you execute the query without specifying a time. For more information about entering query criteria, see *Simple Query Operators*.
- Planned Start is a date and time field (not just a date field), and this allows a high granularity when searching.

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

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

Calculator

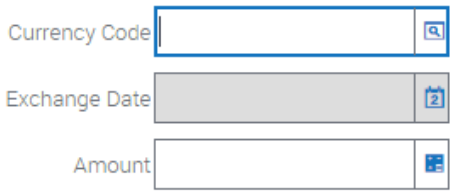
You access the calculator by clicking the calculator button that appears in a field for an amount. The following image shows an example of the calculator.



Currency Calculator

You access the currency calculator by clicking the dollar sign button that appears in a field for a currency amount. You use the currency calculator to specify financial transaction information in foreign currencies.

The following image shows an example of the currency calculator.



The following table describes each field and its associated field control in the currency calculator.

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

6 Selection Dialog Boxes

Selection Dialog Boxes

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

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

Launching Selection Dialog Boxes

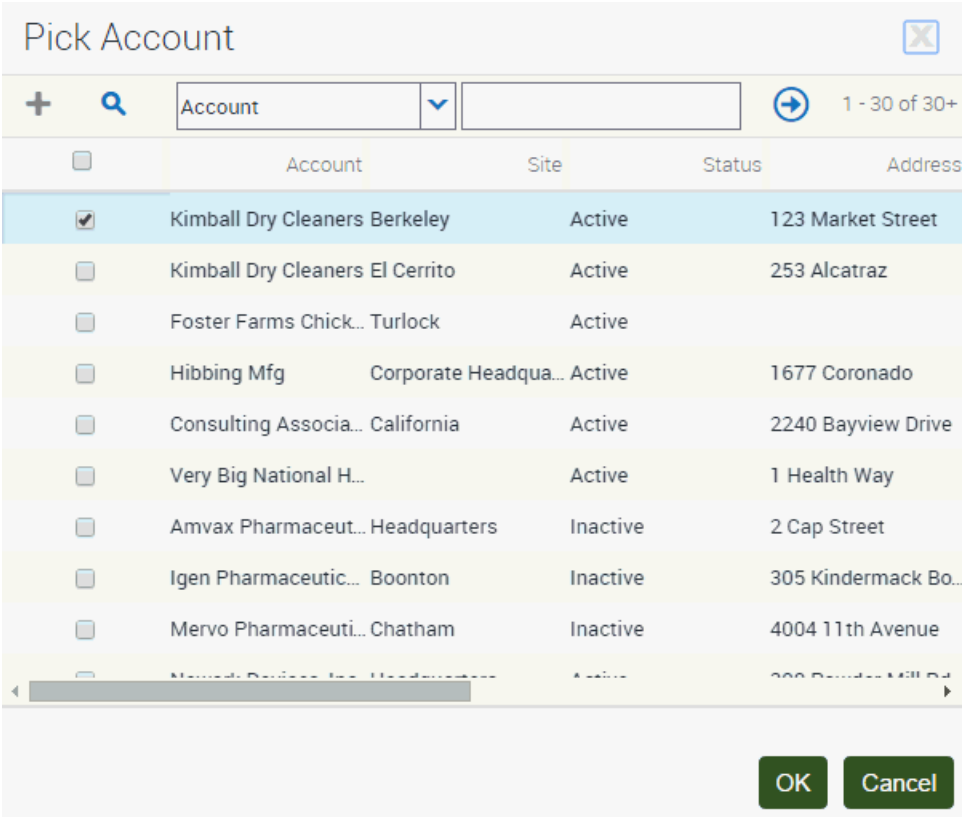
The following table describes the buttons that launch selection dialog boxes.

Button	Name	Description
	Single select button	Launches a single selection dialog box. This dialog box applies to pick applets. Single selection dialog boxes allow you to add only one record to a field. In some cases, you can create a record using the single selection dialog box.
	Multiple select button	Launches a multiple selection dialog box. This dialog box applies to Multi-Value Group (MVG) applets. Multiple selection dialog boxes allow you to select multiple records and add them to a field. In some cases, you can create a record using the multiple selection dialog box.

Associating Records Using a Single Selection Dialog Box

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

The following image shows an example of a Pick Account single selection dialog box.



Associating Records with Existing Records

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

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

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

   A single selection dialog box appears.
4. In the dialog box, locate and select the record you want to associate with the existing record.
5. Click OK.

Associating Records with New Records

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

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

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

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

   A single selection dialog box appears.
4. Click New (the plus (+) icon).

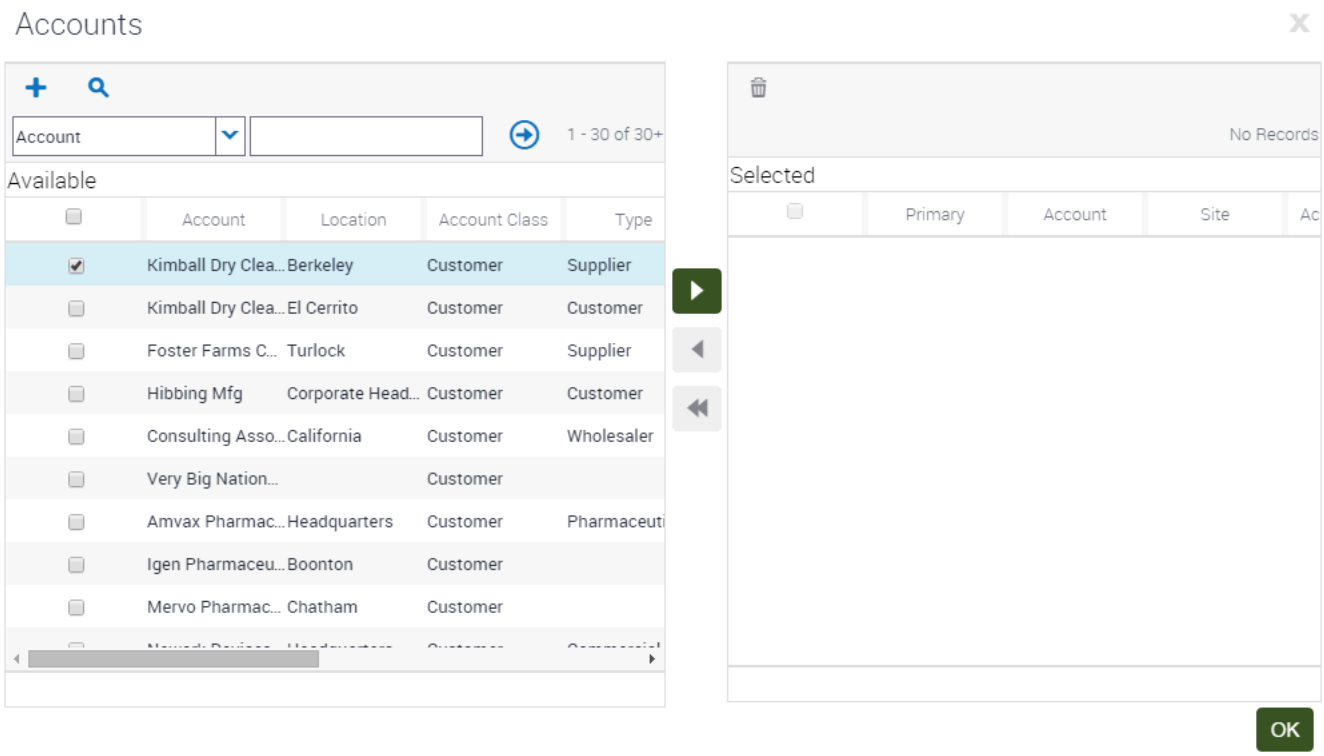
   The form for the new record appears.
5. In the form, enter the information for the new record, and click Save.

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

Associating Records Using a Multiple Selection Dialog Box

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

The following image shows an example of a multiple selection dialog box for Accounts.



Associating Records with Existing Records

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

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

1. Navigate to the appropriate screen.
2. Select the record you want to associate with other records.
3. Click the multiple select button in the appropriate field.

   A multiple selection dialog box appears showing the list of available records and a list of selected records for the field.
4. In the list of available records, select the record you want to associate with the current record, and then click Add to move the record to the list of selected records.

   Note: You can select multiple records by holding down the CTRL key and clicking each record. To select records that are contiguous, you can select the first record, hold down the SHIFT key, and select the last record.
5. (Optional) To remove one or more records in the list of selected records, select the records, and then click Remove to move the records back to the list of available records.
6. Click OK.

Associating Records with New Records

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

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

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

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

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

   A multiple selection dialog box appears showing the list of available records and a list of selected records for the field.
4. Click New (the plus (+) icon).

   The form for the new record appears.
5. In the form, enter the information for the new record, and click Save.

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

Querying for Records in a Selection Dialog Box

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

To query for records in a selection dialog box

1. In the selection dialog box, click Query (the magnifying glass icon).

   A blank row appears in the selection dialog box.
2. Enter your query criteria in the appropriate fields.

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

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

   The records matching your query criteria appear.

Finding Records in a Selection Dialog Box

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

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



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

To find records in a selection dialog box

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

   In a multiple selection dialog box, the drop-down list for record fields appears before the list of available records, and not before the list of selected records.
2. Type the text you want to search for in the field for a search value.

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

Search queries in pick lists are not case sensitive.

3. Click Go.

   The records matching your criteria appear.

7 Synchronizing Data for Disconnected Use

Synchronizing Data for Disconnected Use

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

- *About Data Synchronization*
- *Synchronization Process*

About Data Synchronization

Data synchronization applies to you if you are a remote user of the application. You must synchronize data on a regular basis to maintain the data on your remote system for disconnected use.

The application is the interface that enables you to add and manipulate information for disconnected use. Using an internet connection, you synchronize your system by sending and receiving data over the internet. *Synchronization Process* shows the synchronization process.

For example, if you add several new opportunities to your local data, then you must synchronize this data, which is on your mobile device, with the data on the network. This synchronization transfers the new data to the network. If, on the server, you are added as a team member to a new account, then you must synchronize data so that the data for this new account is added to your mobile device.

For information about setting up synchronization preferences, see *Siebel Remote and Replication Manager Administration Guide* .

You synchronize data regularly for the following reasons:

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

Note: You must synchronize data quickly so that the most up-to-date information resides on your mobile device. Each organization has its own guidelines for the synchronization process.

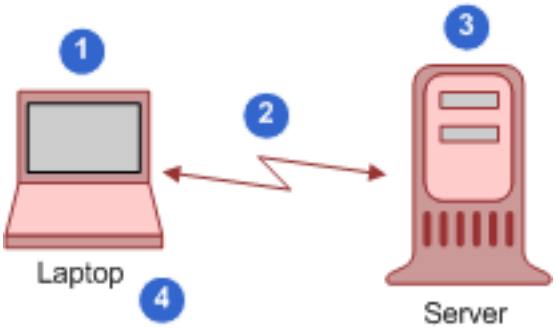
Synchronization Process

The following image shows the steps involved in the synchronization process, which are as follows:

1. You make offline changes to the data on your mobile device (tablet or laptop).
2. You dial in and synchronize data.

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

3. The server accepts all the changes to the server data and any new or changed data from your mobile device.
4. You see all the changes to your mobile device data and any new or changed data from the server.



8 Keyboard Navigation and Shortcuts

Keyboard Navigation and Shortcuts

This chapter describes how to navigate the keyboard and use keyboard shortcuts in your Web application. It includes the following topics:

- *Keyboard Navigation*
- *Keyboard Shortcuts*
- *Application Management Keyboard Shortcuts*
- *Online Help Keyboard Shortcuts*
- *General Navigation Keyboard Shortcuts*
- *Layout Management Keyboard Shortcuts*
- *Record Management Keyboard Shortcuts*
- *Record Navigation Keyboard Shortcuts*
- *Query Management Keyboard Shortcuts*
- *Field Management Keyboard Shortcuts*
- *Communication Management Keyboard Shortcuts*
- *Call Management Keyboard Shortcuts*
- *Example Using Keyboard Shortcuts to Select the Displayed Columns*

Keyboard Navigation

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

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

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

The following keys facilitate keyboard navigation in applications:

- **Arrow keys.** Press the arrow keys to navigate within a widget (such as within a list applet, within a form applet, within a drop-down list, and so on).
- **ENTER key.** Press ENTER to navigate to the screen if the focus is on the screen or to navigate to the view if the focus is on the view.
- **ENTER key behavior in applets and dialog boxes.** Pressing ENTER while focusing on a control button results in the same behavior as clicking the control button.

- **ESC key.** Press ESC to close an interface element, such as a calendar control, a calculator control, and so on, without saving changes in the interface element. Also, press ESC to cancel an operation, such as an operation to create a query or to create a record.
- **ESC key behavior in applets and dialog boxes.** A confirmation message appears (showing the OK and Cancel buttons) when a user closes a dialog box by clicking Close (the X icon) in the upper corner of the dialog box.
    - Press ENTER to close the confirmation message and the dialog box.
    - Press ESC to close the confirmation message and return to the original dialog box.
- **ESC key and Undo.** Pressing ESC once performs a single undo operation. Pressing the Undo key multiple times might generate multiple results depending on the user's previous activity, including which user interface elements the user has interacted with.
- **TAB key and TAB+SHIFT key.** Press TAB to navigate forward and TAB+SHIFT to navigate backward between widgets (interface elements, such as the application-level menu and application toolbar).

  TAB and TAB+SHIFT moves the focus among widgets and standard HTML controls. For example, pressing the TAB key in a typical List Form view moves the focus in the following sequence:

    - Application-level menu
    - Saved Queries/PDQ
    - Application toolbar
    - Visibility Filter
    - List applet menu
    - List applet buttons (one by one)
    - List column headers (one by one)
    - List applet grid first row first list column control
    - Form applet menu
    - Form applet buttons
    - Form applet controls (one by one)

  High-level widgets, such as, the application-level menu, applet menu, tabs at any of the four possible levels, list applet grid, and so on have complex navigation requirements between their constituent elements.

  When you are within a widget, use the following keys to handle tasks:

    - The the arrow keys to navigate up, down, back (previous), and forward (next).
    - The ENTER key to drill down on the object in focus.
    - The ESC key to cancel or back out of an operation.

The keyboard navigation keys described here are simple to use and easy to remember. The remainder of this module describes the application-specific keyboard shortcuts (supported for navigating in the user interface) and they are useful for performing frequent and repetitive tasks. Browser vendors support an additional set of useful shortcut combinations.

Keyboard Shortcuts

The keyboard shortcuts in this module are organized in category tables according to the actions they perform. The context column indicates where in the application you perform each action because keyboard shortcuts are based on application context, or focus rules. If a command is not available in the application, then the keyboard shortcut is not active.

Some keyboard shortcuts described in the tables in this module do not execute the designated action in all browsers. Also, if a keyboard shortcut for an action in a table is the same keyboard shortcut for a different action in your browser, then the resulting action might be the action for your browser.

Note: The keyboard shortcuts described in this module are included in your Siebel application. If your administrator changes the configuration of these keyboard shortcuts, then your keyboard shortcuts might be different. Because of the browser that you use, it might be necessary to change the default keyboard shortcuts in your browser preferences or in your applications. If you encounter difficulties using the keyboard shortcuts, then contact your administrator.

Application Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to perform general activities in your application.

Action	Keyboard Shortcut	Context
Synchronize the database.	• SHIFT+F5	Application
Update the audit cache.	• CTRL+ALT+X	Application
Connect as new mobile user.	• CTRL+SHIFT+W	Application
Log out.	• CTRL+SHIFT+X	Application

Online Help Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to access options available on the Help application-level menu.

Action	Keyboard Shortcut	Context
Display the online help.	• CTRL+H	Screen
Display information about a record.	• CTRL+ALT+K	Record
Display technical support information, including system information.	• CTRL+ALT+J	Application

General Navigation Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to navigate in your application.

Action	Keyboard Shortcut	Context
Go to the Site Map.	• CTRL+SHIFT+A	Application
Go to the application-level menu.	• CTRL+ALT+M	Application
Go to screen tabs.	• CTRL+SHIFT+T Siebel shortcut. Not available in Google Chrome so it is recommended that you alter this shortcut accordingly. • INSERT+CTRL+R JAWS shortcut. CTRL+SHIFT+T is the shortcut, but for JAWS users it is recommended that you use the INSERT+CTRL+R Region List command.	Application
Go to the view tabs.	• CTRL+ALT+T Siebel shortcut. • INSERT+CTRL+R JAWS shortcut CTRL+ALT+T is the shortcut, but for JAWS users it is recommended that you use the INSERT+CTRL+R Region List command.	Application
Go to the subview tabs.	• CTRL+ALT+V Siebel shortcut.	Application

Action	Keyboard Shortcut	Context
	Not available in Google Chrome so it is recommended that you alter this shortcut accordingly. • INSERT+CTRL+R JAWS shortcut. CTRL+ALT+V is the shortcut, but for JAWS users it is recommended that you use the INSERT+CTRL+R Region List command.	
Open the Menu (cogwheel icon) on a list or form.	• CTRL+SHIFT+M • CTRL+SHIFT+G	List, form
Go to the next list or form.	• CTRL+SHIFT+] • CTRL+ALT+]	Application
Go to the previous list or form.	• CTRL+SHIFT+[• CTRL+ALT+[	Application
Open the Tasks pane.	• CTRL+SHIFT+Y	Application
Go to a tree applet.	• CTRL+SHIFT+4	Application
Go to the previous tree applet node.	• Up Arrow	Application
Go to the next tree applet node.	• Down Arrow	Application
Go to the field for the visibility filter.	• CTRL+SHIFT+V	Application

Layout Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to change the appearance of lists in your application.

Action	Keyboard Shortcut	Context
Sort a single column.	• ENTER	List column header
Open a dialog box to perform advanced sorting.	• CTRL+SHIFT+O	List
Open a dialog box to select the displayed columns.	• CTRL+SHIFT+K	List

Action	Keyboard Shortcut	Context
	• CTRL+SHIFT+B	

Record Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use when performing record management tasks in your application.

Action	Keyboard Shortcut	Context
Create a record.	• CTRL+ALT+N	List, form
Create a record using a Quick Fill template.	• CTRL+K	Form
Create a record using the last used Quick Fill template.	• CTRL+J	Form
Apply a Quick Fill template to a record.	• CTRL+Q	Form
Copy a record.	• CTRL+B • CTRL+ALT+B	Record
Save a record.	• CTRL+SHIFT+S • CTRL+S If you use this shortcut to save a record that has an invalid value in a field, then the Save As dialog box may appear in error. In Mozilla Firefox and Google Chrome, you will be prompted to check if your data is in the correct format.	List, form
Delete a record.	• CTRL+D • CTRL+ALT+D	Record
Undo a record.	• ESC	Record
Select all records.	• CTRL+ALT+A Applies when each record has a field with a check box. • CTRL+A	List

Record Navigation Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to navigate to records in your application.

Action	Keyboard Shortcut	Context
Go to the previous record.	• CTRL+SHIFT+, (comma) • CTRL+Up Arrow • ALT+, (comma)	List, form
Go to the next record.	• CTRL+SHIFT+. (period) • CTRL+Down Arrow • ALT+. (period)	List, form
Go to the previous record set.	• CTRL+ALT+, (comma)	List
Go to the next record set.	• CTRL+ALT+. (period)	List
Go to the first record set.	• ALT+U	List, form
Go to the last record set.	• ALT+L	List, form

Query Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to work with queries in your application.

Action	Keyboard Shortcut	Context
Create a query.	• ALT+Q	List, form
Run a query.	• ALT+ENTER • CTRL+ENTER • ENTER	List, form
Refine a query.	• ALT+R • ALT+G	List, form
Save a query with different name.	• CTRL+ALT+S • ALT+S	List, form

Action	Keyboard Shortcut	Context
Open a dialog box for the query assistant.	• CTRL+SHIFT+Z	List, form
Cancel a query.	• CTRL+SHIFT+9	List, form

Field Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use when performing field management tasks in your application.

Action	Keyboard Shortcut	Context
Open a selection dialog box for a field. Open the calendar control for a field. Open the calculator control for a field.	• F2	Field
Close a selection dialog box for a field.	• CTRL+ALT+O	Field
Open a drop-down list for a field.	• F2 • Down Arrow	Field
Drill down on a field.	• CTRL+SHIFT+Space	Field

Communication Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use to share information with others in your application.

Action	Keyboard Shortcut	Context
Go to the Correspondence screen to send a letter.	• CTRL+L	Record
Open a dialog box to send an email.	• F9	Record
Open a dialog box to send a fax.	• CTRL+F9	Record
Open a dialog box to send a page.	• SHIFT+F9	Record

Action	Keyboard Shortcut	Context
Open a dialog box to send an outbound wireless message.	• ALT+F9	Record
View a work item.	• SHIFT+F8	Record
Set work mode to ready.	• CTRL+F2	Record
Set work mode to not ready.	• CTRL+F3	Record
Set work mode to other.	• CTRL+F4	Record
Set work mode to after call work.	• CTRL+F5	Record
Set work mode to busy.	• CTRL+F6	Record

Call Management Keyboard Shortcuts

The following table lists the keyboard shortcuts you can use when calling others in your application.

Action	Keyboard Shortcut	Context
Associate call.	• F8	Call
Blind transfer of a call.	• ALT+F7	Call
Transfer a conference call.	• CTRL+F7	Call
Consultative transfer of a call.	• SHIFT+F7	Call
Release a call.	• F12	Call
Make a call.	• F7	Call
Make a finance call.	• CTRL+SHIFT+F	Call
Make an insurance call.	• CTRL+SHIFT+I	Call
Answer a call.	• F6	Call

Action	Keyboard Shortcut	Context
Set work mode to post call wrap-up.	• CTRL+F5	Call

Example Using Keyboard Shortcuts to Select the Displayed Columns

The following procedure shows you how to use keyboard shortcuts to select the displayed columns - that is, to move columns from the Available Columns list to the Selected Columns list.

To use keyboard shortcuts to select the displayed columns

1. Click CTRL+Shift+K to open the Displayed Columns dialog box.

   There are two lists, positioned side by side, in the Displayed Columns dialog box: The Available Columns list appears first followed by the Selected Columns list.
2. Click the tab button to go to the Available Columns list (which appears first in the Displayed Columns dialog box).
3. Click the up or down arrow to select the column that you want to move.
4. Click the tab button to go to the arrow pointing forward, and then click ENTER (or SHIFT+ENTER).

   The selected column moves from the Available Columns list into the Selected Columns list.

Repeat this task as required to select the displayed columns that you want.

9 Record Management

Record Management

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

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

Creating Records

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

This topic shows how to create records using some options available in the application. You can use the method that you prefer, or the method that is available.

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

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

To create a record

1. Do one of the following:
   - In the list or form, click Add or New (the plus (+) or double plus (++) icon).
   - In the list or form, click Menu (the cogwheel icon), and then click New Record.
   - In the list or form, click Edit, and then select New Record from the application-level menu.

   A blank record form or line item appears, containing fields to complete.
2. Enter the appropriate data, and save the record.

Related Topics

Associating Records Using a Single Selection Dialog Box

Associating Records Using a Multiple Selection Dialog Box

Copying Records

Creating Records Using Quick Fill

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

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

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

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

Creating Quick Fill Templates

You can create a quick fill template.

To create a quick fill template

1. In a form, create a new record.

   Do not save this record.
2. Complete all the record fields for which you want to define default values.
3. In the form, click Menu (the cogwheel icon), and then click Save as Template.

   The Save Template As dialog box appears.

   If an error message appears about entering a value for a required field, then click OK to dismiss the message.
4. Use the Template Name and Template Description fields to name and describe the quick fill template.
5. Click Save.
6. If a message appears indicating that you cannot save the template because a template with the same name already exists, then do the following:
   a. Click OK on the message dialog box.
   b. Click Overwrite to overwrite the existing template.
   c. In the Template Name field, type in a name to save the template with a different name and then click Save.
7. Delete the new record.

Applying Quick Fill Templates to New Records

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

To apply a quick fill template to a new record

1. In a form, create a new record by completing the required fields only.
2. Save the record and then drill down on the new record.
3. In the form, click Menu (the cogwheel icon), and then click Apply Template.

   The Pick Template dialog box appears.
4. In the Pick Template list, select the template you want to use, and click OK.

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

Creating Records Using Quick Fill Templates

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

To use a quick fill template to create a record

1. In a form, click Menu (the cogwheel icon), and then click New From Template.

   The Pick Template dialog box appears.
2. In the Template list, select the template you want to use, and click OK.

A new record appears, populated by the values defined in the quick fill template.

Creating Records Using the Last Quick Fill Template

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

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

- In a form, click Menu (the cogwheel icon), and then click New From Last Template.

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

Copying Records

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

To copy a record

1. Find and select the record you want to copy.
2. Complete either of the following steps:
   - Click Menu (the cogwheel icon), and then click Copy Record.
   - From the application-level menu, choose Edit, then Copy Record.

   A new record appears, populated with the copied data.
3. Change the fields in the new record as needed, and step off the record to save your changes.

Editing Records

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

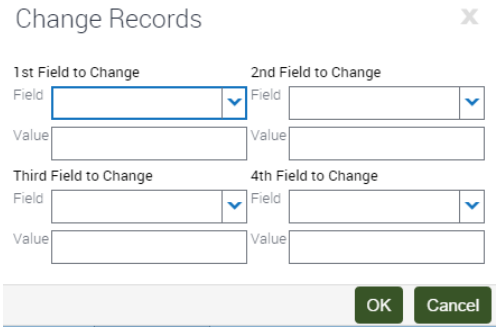
To edit a record

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

Changing Multiple Records

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

The following image shows an example of the change records dialog box.



To change multiple records

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

   To select records that are contiguous, you can select the first record, hold down the SHIFT key, and select the last record.
3. Click Menu (the cogwheel icon), and then click Change Records.

   The Change Records dialog box appears.

   In the drop-down lists for the fields in this dialog box (1st Field, 2nd Field, 3rd Field, and 4th Field to Change), columns on the list applet appear, except for those columns that are marked Inactive or Read Only. List columns do not appear if they are based on a join field and pick applets are not associated with them.

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

4. From the 1st Field to Change 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 enter all of the information you want to change in your selected records.
6. Click OK to apply the changes.

Saving Records

You can save records in several ways.

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

To save a record

- When you finish editing or adding a record in a form or list, do one of the following:
  - Step off the record to commit the changes to the database.

    Stepping off the record means leaving it in any way, such as by moving to another record or by using the record navigation buttons.
  - Click Menu (the cogwheel icon), and then click Save Record.

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

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

Canceling Changes to Records

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

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

To cancel changes to a record

- Do one of the following:
  - Click Menu (the cogwheel icon), and then click Undo Record.
  - From the application-level menu, choose Edit, then Undo Record.

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

Deleting Records

You can delete a record by using Delete (the trash can icon), Menu (the cogwheel icon) in a list or form, and the application-level menu. Only one record can be deleted at a time.

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

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

To delete a record

1. Do one of the following:
   - Select the record you want to delete, and then click Delete (the trash can icon).
   - Select the record you want to delete, click Menu (the cogwheel icon), and then click Delete Record.
   - From the application-level menu, choose Edit, then Delete Record.

   A dialog box appears, asking you to confirm the deletion.
2. Click OK to delete the record.

Associating Records Together

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

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

To associate a record with another record

1. Navigate to the appropriate screen.
2. Drill down on a field in the record with which you want to associate another record.
3. Navigate to the appropriate view.
   The selected view appears.
4. In the selected view, click Add or New (the plus (+) or double plus (++) icon).
   A blank record or a selection dialog box appears.
5. Do one of the following:

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

Related Topics

Creating Records

Associating Records Using a Single Selection Dialog Box

Associating Records Using a Multiple Selection Dialog Box

Printing Records

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

- **Running a report.** You can print records by running and then printing a report. For more information about reports, see *Running Reports*.
- **Browser print.** You can use the print feature for the browser to print an image of the current screen. To print a screen that contains colors, then use the color printing feature for your browser. Color printing is important for screens in which colors signify meaning, such as calendar screens and notification screens.



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

Using Field Hyperlinks in Records

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

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

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

Displaying Record Count

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

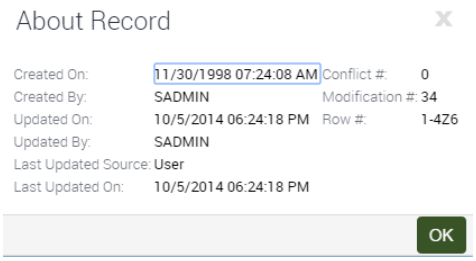
To display a record count

1. (Optional) Execute a query.
2. Click Menu (the cogwheel icon), and then click Record Count.

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

Finding Information About Records

You can view information about a record in the About Record dialog box. The following image shows an example of the About Record dialog box.



To find information about a record

1. Navigate to and select the record.
2. Click Menu (the cogwheel icon), and then click About Record.

   The About Record dialog box appears and it contains the following information.

Field	Description
Created On	Displays the date and time that the record was created.
Created By	Displays who created the record.
Updated On	Displays the date and time that the record was last updated.
Last Updated Source	Displays the component for the record. This information is useful for debugging issues when multiple components might change the data.

Field	Description
Last Updated On	Displays the date and time when the data changed in the database and provides a consistent timestamp usage across all components for each record. For remote users, the Last Updated date (in the extracted database) might be different from the Last Updated On date (in the server database).
Conflict #	Displays the conflict number. Siebel Remote uses this number to prevent duplication of records. For more information, see *Siebel Remote and Replication Manager Administration Guide* .
Modification #	Displays the modification number. This number increases each time a record is updated. It is used when two or more users try to update a record at the same time. For example, if user A and user B are both reading a record with modification number 3, and user A updates the record, then the modification number changes to 4. If user B then tries to update the record, then the modification number of user B's record (3) is not current, and user B's update is rejected. User B is not able to update the record until it is refreshed with user A's changes.
Row #	Displays the Row ID for the record. **Note:** In Siebel CRM Innovation Pack 2017 and later releases, for List of Values, the Row ID for a record corresponds to the WS_SRC_ID (workspace source ID).

3. Click OK to close the dialog box.

Accessing the About Record Dialog Box After a Merge

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

Identifying New Records

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

If a record is newly added to the application, then an asterisk (a star icon) appears in the New field in that record. After you drill down on a field in the new record, the asterisk disappears from the New field.

Note: The asterisk in the New field is specific to the primary employee. If you are not the primary employee for a position, then the asterisk still appears after you drill down.

To identify a new record

- In a list, look for an asterisk (a star icon) in the New field for the record.

Flagging Records

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

To flag a record

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

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

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

Adding Notes to Records

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

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

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

To add a note to a record

1. Find and drill down on a field in the record to which you want to add a note.
2. Navigate to the Notes view, and then navigate to the Private Notes subview or the Public Notes subview.
3. Click New (the plus (+) icon) to create a record.
4. From the drop-down list for the Type field, choose Note.
5. In the Description field, enter the text for the note.

Merging Duplicate Records

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

When you use the Merge Records command, the Merge Records dialog box appears with a message similar to the following:

```
Merge Records
The 2 selected record(s) will be merged into Person Uid: 55:3CFCH. Proceed to merge?
OK/Cancel
```

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

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

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

To merge two records

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

   After the merge is complete, the source record is merged into the surviving record.
3. From the application-level menu, choose Edit and then Merge Records.

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

   The Merge Records dialog box appears, displaying a field value for the surviving record.
4. Review the information in the dialog box to make sure the correct record survives, and click OK to complete the merge.

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

Attaching Files to Records

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

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

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

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

You can attach files to records in the following ways:

- *Attaching Files Using the New File Button*
- *Attaching Files Using Menu (the Cogwheel Icon)*
- *Attaching Files By Moving Files to the Attachments View*

Attaching Files Using the New File Button

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

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

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

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

   The dialog box closes, and the file appears in the Attachments list as an attachment record with the appropriate fields populated.
5. Select the following check boxes as required:

Field	Description
Update File	Select this check box to indicate that you want the attachment copy of the file to be updated automatically each time the original file is updated.

Field	Description
Download File	Select this check box to indicate that the document is retrieved during the next synchronization session. This option allows you to request files from the server, and applies only if you use Siebel Remote.

Attaching Files Using Menu (the Cogwheel Icon)

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

To attach a file to a record using Menu

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

   The Attachments list appears.
3. Click Menu (the cogwheel icon), and then click New Record to create a record.
4. In the Attachment Name field, click the select button.

   The Add Attachment dialog box appears.
5. Click Browse to locate and select the file you want to attach to the record, and then click Open.

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

Attaching Files By Moving Files to the Attachments View

You can create an attachment by moving a file to the Attachments view.

To attach a file to a record by moving the file to the Attachments view

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

   The Attachments list appears.
3. Locate the file you want to attach to the record.
4. Click the file to select it and with the mouse button depressed, move the file to the Attachments list and then release the mouse button.

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

Attaching URLs to Records

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

You can attach URLs to records in the following ways:

- *Attaching URLs Using the New URL Button*
- *Attaching URLs Using Menu (the Cogwheel Icon)*

Attaching URLs Using the New URL Button

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

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

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

   The Attachments list appears.
3. Click New URL.

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

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

Attaching URLs Using Menu (the Cogwheel Icon)

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

To attach a URL to a record using Menu

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

   The Attachments list appears.
3. Click Menu (the cogwheel icon), and then click New Record to create a record.
4. In the Attachment Name field, click the select button.

   The Add Attachment dialog box appears.
5. Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click the Save to save the record.

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

Attaching Emails and Email Attachments to Records

Provided that you install and deploy the Outlook to Siebel Drag and Drop addin (see Article ID 2117212.1 on My Oracle Support), then you can directly attach emails or email attachments from your Microsoft Outlook email client to records in your Siebel application. This improves the usability and productivity of call center agents.

To attach Microsoft Outlook emails or email attachments to records

1. Download the Outlook to Siebel Drag and Drop addin, and then double click Outlook_Add-in_for_Siebel.exe to install the addin.

   Restart Microsoft Outlook for the addin to take effect. In the Microsoft Office client, verify that the Outlook to Siebel Drag and Drop addin is installed successfully.

   Note: In Siebel Innovation Pack 2017, support for Outlook to Siebel Drag and Drop has been enhanced. For more information, see the topic about Installing Outlook to Siebel Drag and Drop on Client Computers in *Siebel Installation Guide* for the operating system you are using.

2. Log in to your application.
3. Navigate to the Activities screen, drill down on the activity to which you want to attach emails or email attachments, and then go to the Attachments view for the selected activity.

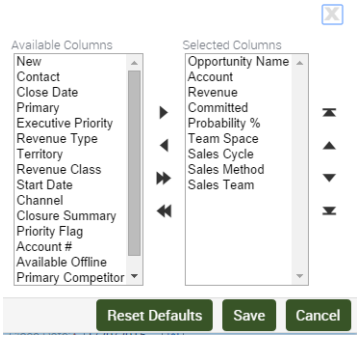
   The Attachments list appears.
4. Now go to your Microsoft Outlook email client and locate the emails or email attachments that you want to attach to the activity record in your application.
5. With both your application and the Microsoft Outlook email client open on-screen, do one or more of the following as required:
   - Select one single email from Microsoft Outlook and with the mouse button depressed, move the email into your application and then release the mouse button.
   - Select multiple emails from Microsoft Outlook and with the mouse button depressed, move the emails into your application and then release the mouse button.
   - Select an email attachment from Microsoft Outlook and with the mouse button depressed, move the email attachment into your application and then release the mouse button.

   Any Microsoft Outlook emails or email attachments that you attach to records in your application appear in the Attachments list.

Organizing List Columns

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

The following image shows an example of the columns displayed dialog box.



To organize columns in a list

1. In a list, click Menu (the cogwheel icon), and then click Columns Displayed.

   The Columns Displayed dialog box appears.
2. Select one or more columns in one of the lists (Available Columns or Selected Columns).
3. Use the following navigation buttons between the Available Columns and the Selected Columns list to show or hide the columns you select.

Button	Description
	Single arrow pointing forward. Click to show the column you select. Moves the column you select to the Selected Columns list. After you click Save, the column will appear in the list you are modifying.
	Single arrow pointing backward. Click to hide the column you select. Moves the column you select to the Available Columns list. After you click Save, the column will not appear in the list you are modifying.
	Double arrows pointing forward. Click to show all columns in the list. Moves all columns from the Available Columns to the Selected Columns list. After you click Save, all columns will appear in the list you are modifying.
	Double arrows pointing backward. Click to hide all columns in the list. Moves all columns from the Selected Columns to the Available Columns list. After you click Save, none of the columns will appear in the list you are modifying.

4. Select a column in the Selected Columns list, and then use the following column order buttons, next to the Selected Columns list, to change the order in which the columns appear in the list.

Button	Description
	Single up navigation arrow. Click to move the column you select. Moves the column you select up one position in the Selected Columns list. After you click Save, the column is moved up one position in the list you are modifying.
	Single down navigation arrow. Click to move the column you select. Moves the column you select down one position in the Selected Columns list. After you click Save, the column is moved down one position in the list you are modifying.
	Single up navigation arrow with a line. Click to move the selected column. Moves the column you select to the start of the Selected Columns list. After you click Save, the column is moved to the start of the list you are modifying.
	Single down navigation arrow with a line. Click to move the selected column. Moves the column you select to the end of the Selected Columns list. After you click Save, the column is moved to the end of the list you are modifying.

5. Click Save.

Sorting List Columns

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

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

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

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

Sorting a Single List Column

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

To sort a single column

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

   The column is sorted in ascending or descending order.
3. Click the column header again.
4. Click Sort.

   The column is sorted in the opposite order.

Performing an Advanced Sort in Lists

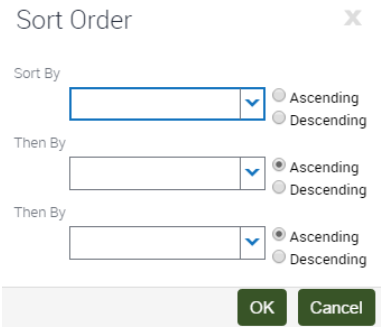
You use the Sort Order dialog box to perform an advanced sort.

To perform an advanced sort in a list

1. In a list, click Menu (the cogwheel icon), and then click Advanced Sort.

   The Sort Order dialog box appears. The following image shows an example of the sort order dialog box.
2. From the drop-down list for the Sort By field, select the first column to sort by.
3. From the drop-down list for the first Then By field, select the second column to sort by.
4. From the drop-down list for the second Then By field, select the third column to sort by.
5. Use the Ascending and Descending option buttons to define the sort order for each column you select for the advanced sort.
6. Click OK.

   The columns are sorted in the order you specify.

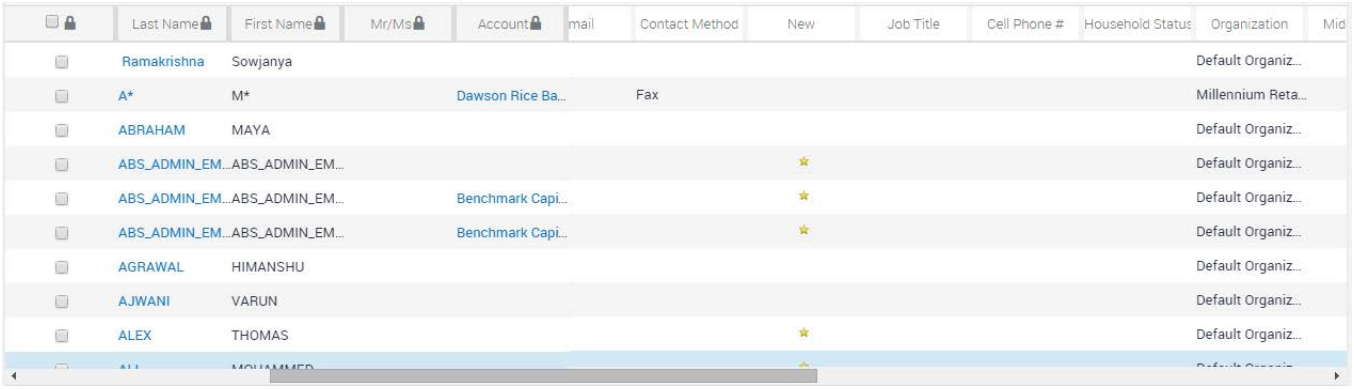


Locking List Columns

Lists can contain many columns. You might find that you want to scroll horizontally across a list to view additional columns without losing focus of the first few columns in the list. In this scenario, you can lock the first few columns. Columns that are locked have a lock icon in the column header to indicate that the column is locked.

The following image shows an example of a list view with some locked columns. The locked columns, all of which have a lock icon, include the Account column and all the columns that precede the Account column.

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



To lock list columns

1. Navigate to the list where you want to lock columns.
2. Click the header of the column that you want to lock.
3. Click Lock.

   A lock appears in the selected column and in all columns preceding the selected column (if there are any). You can scroll across the remaining columns without loosing focus of the locked columns.
4. To unlock list columns, click the header of the last locked column (which is beside the first unlocked column), and then click Unlock.

   The lock disappears from the selected column and in all columns preceding the selected column.

Note: Locks on columns disappear when you tab (CTRL+TAB) from an unlocked column to a locked column. This is expected behavior since tabbing into a locked field is assumed to be an attempt to update the field.

Resizing List Columns

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

To resize columns

1. Place the cursor over the column divider of the column you want to resize.

   A resize arrow appears.

2. Click to select the column divider and, without releasing the selection, move the column divider out to widen the column or in to narrow the column.

10 Information Query

Information Query

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

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

About Queries

You use queries to locate one or more records that meet specified criteria. In contrast, you use a search operation (see *About Search Functionality*) to perform a broad search that does not require you to specify specific fields to search on.

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

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



Note: Drilldown in a query is not supported. In a query, results are returned in a field which is editable and this does not allow drilldown.

Accessing the Query Control

You access the query control by clicking New Query on the *application taskbar*. Within the query control, you access various drop-down lists for record fields, which helps you narrow your query criteria.

About the Saved Queries Drop-Down List

You can select saved queries from the Saved Queries drop-down list on the application toolbar. In this list, you can access your saved queries and the predefined queries established by your organization.

Predefined Queries

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

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

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

To execute a predefined query

- Do one of the following:
  - Click Execute Query on the application taskbar to execute a predefined query.
  - Use the appropriate keyboard shortcut (ALT+R).

Case Insensitive and Accent Insensitive Queries

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

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

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

A case-insensitive query works on all supported databases for the current release of the application. However, an accent-insensitive query works only on the databases that provide the accent-insensitivity feature, such as Microsoft

Structured Query Language (SQL). For more information about supported databases, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

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

Queries Toolbar

When performing a query, a queries toolbar appears on lists and forms. The following table describes the typical buttons that appear on the queries toolbar. Your application might contain additional buttons or other elements on each list or form toolbar.

Button	Name	Description
	Query Assistant	Click Query Assistant to start the query assistant. For more information about the query assistant, see *Using the Query Assistant*.
	Go	Click Go to execute the query.
	Cancel	The Cancel to cancel the query.

Creating Queries for Records

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

To create a query for records

1. Navigate to the screen.
2. Do one of the following:
   - In the list or form, click Query (the magnifying glass icon).
   - In the list or form, click Menu (the cogwheel icon), and then click New Query.

- From the application-level menu, choose Query, then New Query.
- From the application taskbar, click the New Query button.
- Use the appropriate keyboard shortcut.

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

3. Enter the query criteria in the appropriate fields.

   A wildcard is automatically assumed after text you enter in the query fields. If you search for `siebe`, then all words beginning with the letters `siebe` are found.

   If you query a data field that has a calendar select button to display the calendar control, then you must include the date field value in quotes. For more information about entering query criteria, see *Simple Query Operators*.
4. Do one of the following:
   - In the list or form, click Go.
   - In the list or form, click Menu (the cogwheel icon), and then click Run Query.
   - From the application-level menu, choose Query, and then Run Query.
   - From the application taskbar, click the Execute Query button.
   - Use the appropriate keyboard shortcut.

   The query executes, and the records that match the query criteria appear.
5. To save the query, then do the following:
   a. From the application-level menu, choose Query, then Save Query As.

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

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

Finding Records in Lists

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

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

To find records in a list

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

   If you do not select a field to filter your search against, then all fields will be searched.
3. In the list header, type the text you want to search for in the field for a search value.

   A wildcard is automatically assumed after text you enter in the value field. If you search for `siebe`, then all words beginning with the letters `siebe` are found.
4. Click Go.

The records that match the criteria appear.

Refining Queries

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

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

To refine a saved query

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

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

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

Deleting Queries

You can delete user-defined queries.

To delete a query

1. Navigate to the screen.
2. From the application-level menu, choose Query, then Delete Saved Query.

   The Delete Record dialog box appears, showing the user-defined queries for that screen.
3. Select the query you want to delete in the Query Name list.
4. Click OK to delete the query.

Canceling Long-Running Queries

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

To cancel a long-running query

1. Execute a query.

   If the query does not return records after a specified period, then a dialog box appears.
2. Click Cancel.

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

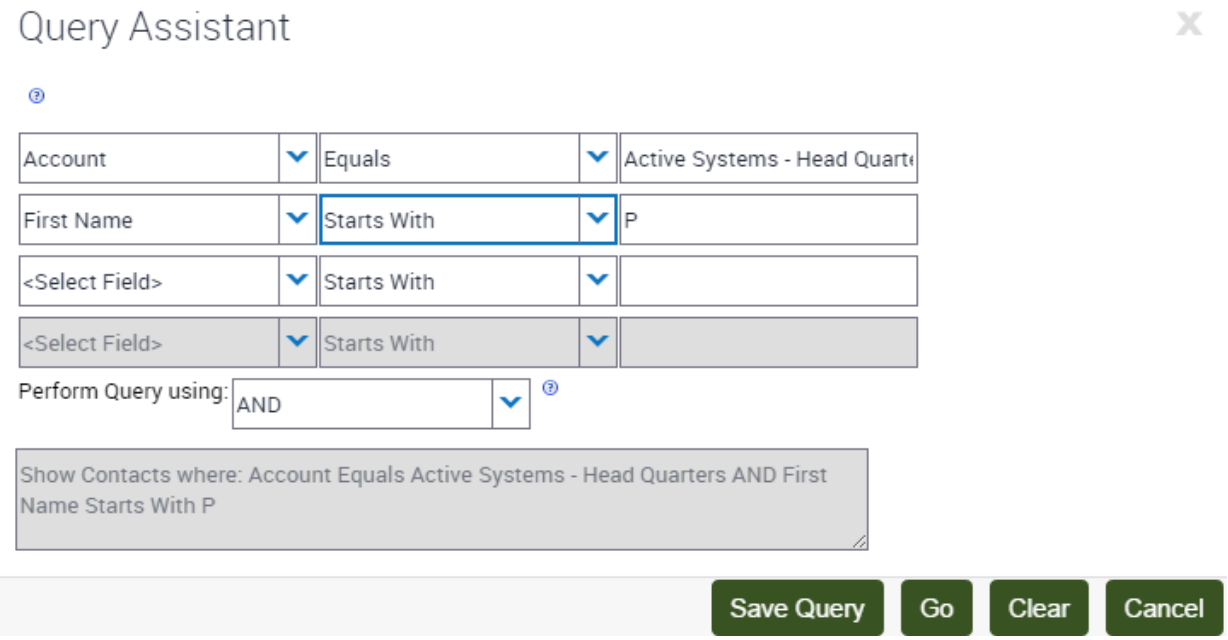
Using the Query Assistant

After clicking Query (the magnifying glass icon) in a form or list, you can click the Query Assistant button to create a query. When you use the Query Assistant, you select operators, instead of entering them, to find the information you are looking for. You also save your query before you execute it by clicking Save Query.

The following image shows an example of the Query Assistant dialog box. In this example, the Query Assistant queries for all accounts where:

```
Account equals Active Systems – Head Quarters
AND
First Name field starts with P
```

Querying in the Query Assistant is case-insensitive.



To perform a query using the Query Assistant

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

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

4. In the Query Assistant dialog box, complete the first row as follows:
   a. From the <Choose Field> drop-down list, select a field to query.
   b. From the Starts With drop-down list, select an operator for the selected field.
   c. Enter the value applicable to the selected operator in the text box.
      Complete the second, third, and other rows as needed in the same way.
   d. Select AND or OR from the Perform Query Using drop-down list to specify the type of operator you want to use between each row of your criteria.
      AND shows only results that meet all the criteria.
      OR shows results that meet any of the criteria.
   e. Click Go.
      The query executes, the Query Assistant dialog box closes, and the records that match the criteria appear.

About Using Default Queries

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

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

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

About Querying a Telephone Number

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

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

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

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

Simple Query Operators

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

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

The following table describes simple query operators. In this table, operators appear in uppercase but they do not have to be in uppercase. Query strings are case-sensitive. You can use simple query operators on their own.

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

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

Compound Query Operators

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

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

Operator	Description	Example
AND, and	Placed between values, returns only records for which all the conditions are true.	***performance* AND *memory*** finds all records that contain both performance and memory in the query field.
OR, or	Placed between values, returns records for which at least one condition is true.	***performance* OR *memory*** finds all records that contain either performance or memory in the query field.

Operator	Description	Example
		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.
() (opening and closing brackets)	Placed before and after the values and operators that are processed first, regardless of the default processing order.	**(sun OR moon) AND NOT stars** returns records that contain sun or moon, but not stars, in the query field.
LIKE, like	Placed before a value, returns records containing the value.	**(performance* OR memory*) AND LIKE (problem)** finds all records in which the query field starts with performance or memory and also includes problem. The LIKE operator is case sensitive. To find matches regardless of case, see *Simple Query Operators*.

Tips for Queries

Note the following tips when you create and execute queries:

- The application automatically adds a wildcard to the end of your query. If you search for **siebe**, then all words beginning with the letters Siebe are found. For more information, see *How Siebel CRM Handles Wildcard Search*.
- When you create a query, the records matching the query criteria appear in a list. While you work with the records in the list and move through the views within the current screen, the list continues to show the records that were found when you executed the query. The list is reset to the default list of records when you leave and then again access the current screen.
- If you no longer need the list of records in a query and want to reset the list, then click navigate to the current screen again to return to the default set of records.
- If a predefined query created by your organization appears in the drop-down list for the Saved Queries field, then you cannot delete this query from the list. However, you can modify the query criteria and save the query using another name. For more information, see *Refining Queries*.
- You cannot query on Notes views when you are connected to the server.
- Any queries that execute in Administration screens against multi-value group fields are automatically appended by EXISTS(). Consequently, you can see every record, regardless of whether it is a primary record.
- When you create a query and navigate through the views, use the hyperlinks on the link bar to return to the queried list of records.
- If you execute a query that includes more than one consecutive blank space, and if you do not place quotes around the query, then the spaces are ignored, and you see inaccurate results.

- When the query results appear in list format, the first record is highlighted. It might appear as though the record you select before running the query appears again, but you are actually seeing a new set of records resulting from your query.
- In query mode, check boxes have three states: checked, unchecked, and intermediate. If you specify intermediate in a check box field when running a query, then your application returns records that are checked and records that are unchecked.

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

11 Information Search

Information Search

This chapter describes how to use the Search Toolbar to perform basic search, advanced find, smart answer search, and Oracle Secure Enterprise Search operations. It includes the following topics:

- *About Search Functionality*
- *Performing a Basic Search*
- *Performing an Advanced Find*
- *Performing a Smart Answer Search*
- *Performing a Smart Answer Search from Service Requests*
- *Performing an Advanced Oracle Secure Enterprise Search Operation*
- *Modifying Search Settings for Oracle Secure Enterprise Search*
- *How Siebel CRM Handles Wildcard Search*

About Search Functionality

You can perform a text search across multiple components, fields, and files, in one operation using the Search Toolbar, which is located on the application toolbar. A search operation allows a broad search by not requiring you to specify specific fields to search on. In contrast, you use a query (see *About Queries*) to locate one or more records that meet specified criteria. Search operations are case insensitive, and you can use boolean operators to create a more precise query.

Note: Drilldown from Find is not supported for multiple results. Only a single result is supported for drilldown.

You can perform search operations on indexed data sources using Search. The Search Toolbar displays Advanced Find and OSES Advanced Search categories.

- For Advanced Find, a drop down list of categories to search against appears.
- For OSES Advanced Search, the Look In field displays the business components that have been indexed for the Search Definition.

The search categories map to individual business components. Multiple search categories can be grouped into logical collections, to enable a single search to be executed against multiple search categories.

The Look In field is preconfigured with different search categories, depending on the application. For a list of preconfigured search objects provided for each application, see *Siebel Search Administration Guide* .

Administrators can configure the search categories in the Search Definition view of the Search Administration UI. Users can perform queries against business component records from anywhere in their application.

Search provides the following functionality:

- **Single Term Search.** A search operation on a single search term. The search term must contain more than one character. Oracle Secure Enterprise Search does not support single character searches.
- **Multiple Term Search.** A search operation on a multiple search terms. The implicit Search Term Separator is AND. For example, if you enter the text performance tuning, it is executed as performance AND tuning. Only results that contain all search terms are returned.
- **Phrase Search.** A search operation on a phrase. The phrase must be entered in quotation marks.
- **Wildcard Search.** A wildcard search operation using the asterisk wildcard operator. You use the wildcard character either to represent a single character, or a sequence of characters. For example, searching for the string `ora*` finds documents that contain all words beginning with Ora such as Oracle and Orator. You can also insert an asterisk in the middle of a word. For example, searching for the string `A*e` finds documents that contain words such as Apple and Ape. For more information, see *How Siebel CRM Handles Wildcard Search*.
- **Special Character Search.** This search operation retrieves special characters other than those facilitated by wildcard searches. For example, if you search for the term `on?line`, the search returns matches to on line, on-line, on;line and on.line.
- **Searching Logical Collections.** Users can choose from several categories listed in the Look In list against which they can search. Multiple search categories can be grouped in a single logical collection, for simultaneous searching.
- Logical collections are defined by the administrator in the Search Indices Parent Category View of the Search Administration UI. For information on defining logical collections, see the topic about Creating a Logical Collection in *Siebel Search Administration Guide* .
- **Automated Suggested Keywords.** The automated suggested keywords feature displays alternate search queries that are based on related keywords. The automated suggested keywords are displayed in the form of a `Did you mean: [Suggested Keyword(s)] message`. This automated message is useful for fixing common errors in search queries, for example, entering `orcle` instead of `oracle`. Also, synonyms can provide more relevant results, for example, cellular phones for cell phones. Alternate keywords can also be used for product code names, acronyms, and abbreviations.
- **Smart Answer Integration.** The Search Center supports integration with the Smart Answer knowledge base for manual or automated searches. For information on configuring and using Smart Answer, see *Siebel Smart Answer Guide* .
- **Computer Telephony Integration.** The Search Center supports Computer Telephony Integration for automated searches. For information on using Computer Telephony Integration, see *Siebel CTI Administration Guide* .

Performing a Basic Search

Basic search searches every field in every business component across all search engines configured for Search (for example: Find, Oracle Secure Enterprise Search, and any other third-party search engine configured). Basic search allows you to perform full text searches using simple or compound (boolean) operators. Using boolean operators, you can create a more precise query.

To perform a basic search

1. Do one of the following as required:
    - In the Search Toolbar, type in your search criteria in the single text field and then press Enter.

- In the Search Toolbar, click in the empty single text field, and then select a search that you recently performed.

  When you click in the empty single text field in the Search Toolbar, a list of the last five searches that you performed appears.
- In the Search Toolbar, type in your search criteria in the single text field and then select one of the auto suggestions to search within a selected category.

  This option requires that the auto suggest feature is enabled for your application's search engine. For more information about enabling the auto suggest feature, see *Siebel Search Administration Guide* .
- If search operators are supported by your search engine then in the Search Toolbar, type in your search criteria in the single text field including the search operator and press Enter.

  The following table describes some search operators that may be supported by your search engine. These operators are also supported by Oracle Secure Enterprise Search.

Operator	Function	Syntax and Description
* (asterisk)	Wildcard	Placed after a string, returns items containing the string, or containing the string plus any additional characters at the position at which it appears, up to (or beginning with) a space. For example, searching for the string **`Ora*`** returns all words beginning with Ora, such as Oracle and Orator.
AND & (ambersand)	Boolean AND	Placed between search terms, returns only records and documents containing both terms. For example, searching for **`Oracle AND Siebel`** returns only records and documents containing both terms.
OR | (vertical bar)	Booleen OR	Placed between search terms, returns records and documents containing either term or both terms. For example, searching for **`Oracle OR Siebel`** returns only records and documents containing one or both terms.
NOT - (hyphen)	Exclusion	Placed before search terms, returns only records and documents that do not contain the search term. For example, searching for **`Oracle -Siebel`** returns only records and documents that contain the word Oracle and that do not contain the word Siebel.
" " (double quotation marks)	Phrase Search	Surrounds a string that, unless modified by a wildcard, must be matched exactly. Allows searching for groups of words in their exact order. For example, searching for **`"Oracle Secure Enterprise Search"`** returns only records and documents that contain the entire phrase Oracle Secure Enterprise Search.

For more information about search operators, see the following topics:

- *Simple Query Operators*
- *Compound Query Operators*
- *How Siebel CRM Handles Wildcard Search*

2. In the Search Results view:
   - Click the arrow beside a result to expand and show a summary of the search result. Click the arrow beside a result to hide the summary again.
   - Click a hyperlink to drill down to the selected record.
   - Click the tab for each search engine configured to show the search results for that search engine. Results appear by default in the Search Results view.
   - If no results are returned, then a message similar to the following appears: Your search did not match any results.

Note: Sorting is applied to the search results that appear in the results view rather than the entire result set. For third-party search engines, the Search Web Service receives SortField and SortOrder hints from Siebel, which indicates that the search results must be sorted. The Web service issues the appropriate commands to the search engine. The search engine sends results based on the SortField and SortOrder values.

Performing an Advanced Find

Advanced Find supports real-time database queries on a field-by-field basis.

To perform an advanced find

1. Select Advanced Find from the drop-down list next to the Search Toolbar, and then click Find.

   A drop-down list of categories to search against appears. If a drop-down list does not appear, then the auto suggest feature is not enabled for your application's search engine. For more information about enabling the auto suggest feature for your search engine, see *Siebel Search Administration Guide* .
2. Select the category you want to search against.
3. (Optional) Click Reset to clear the fields of the search criteria from the last find operation.

   Reset clears the search criteria from the UI, but retains the search criteria in the cache.
4. Enter your search criteria in the fields for the selected category.

   The search criteria for that category is saved until the next find operation.
5. Click Find to view the search results in the Search Results view.
6. In the Search Results view:
   - Click the arrow beside a result to expand and show a summary of the search result. Click the arrow beside a result to hide the summary again.
   - Click a hyperlink to drill down to the selected record.
   - Click the tab for each search engine configured to show the search results for that search engine. Results appear by default in the Search Results view.

- If no results are returned, then a message similar to the following appears: Your search did not match any results.

Performing a Smart Answer Search

The Search Center supports integration with the Smart Answer knowledge base for manual or automated searches. For information on configuring and using Smart Answer, see *Siebel Smart Answer Guide* .

To perform a Smart Answer search

1. Select Advanced Find from the drop-down list next to the Search Toolbar, and then click Find.

   A drop-down list of categories to search against appears.
2. Select the Smart Answer category you want to search against.

   Options include the following: Smart Answer, Smart Answer Service Request
3. Enter your search criteria in the Question text box, including the search operator.

   The table in *Performing a Basic Search* describes the supported search operators.
4. Click Find to view the search results in the Search Results view.
5. In the Search Results view:
   - Click the arrow beside a result to expand and show a summary of the search result. Click the arrow beside a result to hide the summary again.
   - Click a hyperlink to drill down to the selected record.
   - Click the tab for each search engine configured to show the search results for that search engine. Results appear by default in the Search Results view.
   - If no results are returned, then a message similar to the following appears: Your search did not match any results.

Performing a Smart Answer Search from Service Requests

The Search Center supports integration with the Smart Answer knowledge base for manual or automated searches. For information on configuring and using Smart Answer, see *Siebel Smart Answer Guide* .

To perform a Smart Answer search from a service request

1. Navigate to the Service screen, then the All Service Requests view.
2. Query for the service request that you want, and then click Go.

   The service request details are returned.
3. From the service request applet, click Smart Answer to execute a smart answer search from the service request.
4. In the Search Results view:

- Click the arrow beside a result to expand and show a summary of the search result. Click the arrow beside a result to hide the summary again.
- Click a hyperlink to drill down to the selected record.
- Click the tab for each search engine configured to show the search results for that search engine. Results appear by default in the Search Results view.
- If no results are returned, then a message similar to the following appears: `Your search did not match any results.`

Performing an Advanced Oracle Secure Enterprise Search Operation

Advanced Oracle Secure Enterprise Search is enabled when a search engine has been configured and set as the default. For more information, see the topic about Activating the Search Engine for Oracle Secure Enterprise Search in *Siebel Search Administration Guide* .

To perform an advanced OSES search operation

1. Select Advanced OSES from the drop-down list next to the Search Toolbar, and enter your search criteria.

   The following Advanced Search options are available:

Option	Description
All these words	This option performs a Boolean AND search operation. This option returns only records and documents containing all search terms. For example, inputting `Oracle Siebel` returns only records and documents containing both Oracle and Siebel.
Any of these words	This option performs a Boolean OR search operation. This option returns records and documents containing one or more of the search terms entered. For example, inputting `Oracle Siebel` returns records and documents containing Oracle, or Siebel, or both.
Exact phrase	This option returns records and documents that exactly match the entered phrase. For example, searching for `Oracle Secure Enterprise Search` returns only records and documents that contain the entire phrase. Quotation marks are not supported for this field.
Exact phrase & All of these words	This option returns records and documents that either exactly match the entered phrase or that contain all the search terms. For example, inputting `Oracle Secure Enterprise Search` returns records and documents that either contain the entire phrase or that contain (all the search terms) Oracle, Secure, Enterprise, and Search.
None of these words	This option returns only records and documents that do not contain the search term. Quotation marks are not supported for this field.

Option	Description
Look In	This option displays the business components that have been indexed for the Search Definition. Select the business component or components to include in the advanced search operation.
Data Source	You can choose to retrieve your search results from multiple data sources. This feature is available if external data sources have been enabled, for example, a File System Connector or a Web Crawler Connector. For information on enabling a File System Connector and a Web Crawler Connector, see *Siebel Search Administration Guide* .
File Format	This option provides the ability to search by file format. The files are processed by MIME type for this search operation. The search can be filtered by the following file types: o All o HTML o Microsoft Excel o Microsoft PowerPoint o Microsoft Word o PDF o Plain text o Rich Text Format

2. Click Advanced Search to view the search results in the Search Results view.
3. In the Search Results view:
   - Click the arrow beside a result to expand and show a summary of the search result. Click the arrow beside a result to hide the summary again.
   - Click a hyperlink to drill down to the selected record.
   - If no results are returned, then a message similar to the following appears: Your search did not match any results.

Modifying Search Settings for Oracle Secure Enterprise Search

The following procedure shows you how to modify the search settings for Oracle Secure Enterprise Search.

To modify the search settings for Oracle Secure Enterprise Search

- Select Search Settings in the Search Toolbar and modify the settings as required. The following table describes the settings that you can modify.

Setting	Description
Default Sort	Use the following options to sort the results: o **Data Source.** The results can be sorted by individual business component, for example, Service Request or Account, or by external data source, for example by File System or Web Crawler. o **Date.** The date that the document was last modified. o **Relevance.** The relevance ranking is determined by Oracle Secure Enterprise Search algorithms and is based on variables such as proximity and frequency. o **Result Type.** The result data type, for example, a database record or a PDF document.
Language	Select a language to search for keywords in that specific language. English is the default search language.
Fetch Language Specific Docs	Select this option to exclude search result records that are not in the selected language.

How Siebel CRM Handles Wildcard Search

You can explicitly include a wildcard (*) in a search string, for example, as follows: `ABC*` or `"*ABC?"`. You can also use the AutomaticTrailingWildcards application configuration parameter and AutomaticWildcardSearch system preference to control whether a wildcard is automatically appended (and prepended in the case of AutomaticWildcardSearch) to a search string.

AutomaticTrailingWildcards Application Configuration Parameter

Siebel CRM appends a trailing wildcard if all of the following conditions are true:

Note: AutomaticTrailingWildcards applies only to Siebel applet search.

1. The search string does not contain any wildcard. For example: `"ABC"`.
2. The equal sign (=) does not precede the search string.
3. The AutomaticTrailingWildcards parameter in the InfraUIFramework section of the application CFG file is set to `TRUE` or does not exist. The uagent.cfg file is an example of an application CFG file.

- If AutomaticTrailingWildcards is set to TRUE (the default value), then Siebel CRM automatically appends a trailing wildcard or adds a LIKE predicate. If you use a script, and if this script creates a query, then Siebel CRM adds a LIKE statement to the SQL that this script creates.
- If AutomaticTrailingWildcards is set to FALSE, then Siebel CRM does not automatically append a trailing wildcard or add a LIKE predicate.

Wildcards are handled differently when you perform a wildcard search in a popup applet using either the filter search fields or the Query button as follows:

- **Filter search fields.** In this case, searching for *Ave returns all records containing *Ave, for example, as follows:

  ```
  Eight Ave Gourmet Market
  Fourth Ave. Grocery
  Gourmet Market 5th Ave
  ```

  In this instance, a trailing wildcard (*) is appended to the search string.

- **Query button.** In this case, searching for *Ave returns only records ending with *Ave as follows:

  ```
  Gourmet Market 5th Ave
  ```

  In this instance, a trailing wildcard (*) is not appended to the search string.

AutomaticWildcardSearch System Preference

Siebel CRM prepends and appends a trailing wildcard to a search string if the AutomaticWildcardSearch system preference is set to TRUE (the default value) or does not exist. AutomaticWildcardSearch applies when using Siebel Find, including Advanced Find functionality, and the Search Toolbar - it does not apply to Oracle Secure Enterprise Search or Siebel applet search. For more information about AutomaticWildcardSearch, see *Siebel Search Administration Guide* .

12 iHelp

iHelp

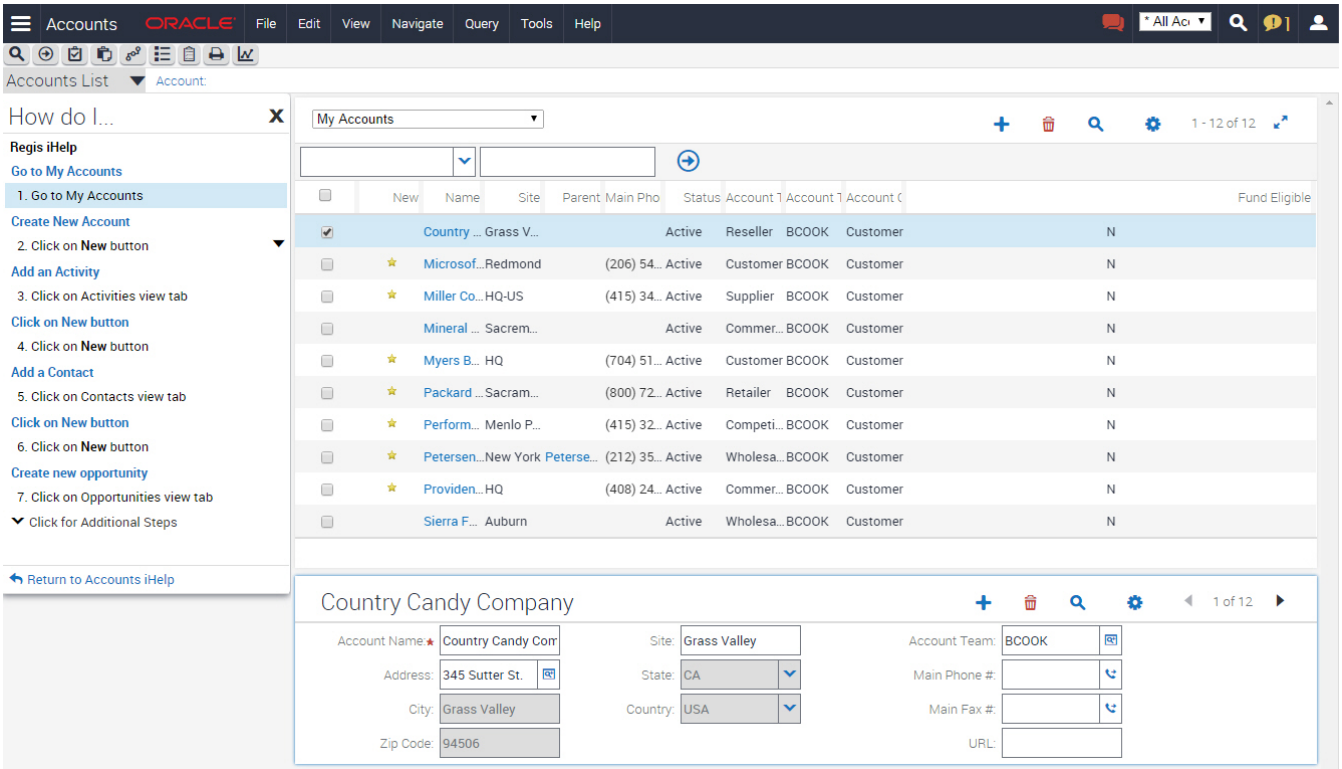
This chapter describes how to use iHelp in your Web application. It includes the following topics:

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

About iHelp

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

The following image shows an example of iHelp items for Accounts.



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

Using iHelp to Complete Tasks

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

To use iHelp

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

   The iHelp pane appears on the side of the application window. The pane lists the iHelp items related to the current screen. The iHelp pane remains open until you close it.
3. In the iHelp pane, drill down on an item to launch iHelp.
4. Follow the instructions provided in the iHelp pane.

   The following explains what happens when you click various options and areas in the iHelp pane:

Click	To do the following
A hyperlink in a step	Navigate to the screen or view to perform an action.
A step	Highlight a button in a form and a list or a field in a form to help you to complete a task.
The down navigation arrow ▼	Expand the description of a step to show its details. The details might contain substeps.
The up navigation arrow ▲	Collapse the description of a step.
Return to	Return to the high-level list of iHelp items.

Click	To do the following
Click for Additional Steps	Access additional steps that are available because of certain met conditions. If this link appears in the iHelp pane, then you must complete each step in sequence before you can access the additional steps. If you do not complete each step, then an error message appears.

5. Click Close (X) in the upper corner of the page to close the iHelp pane.

Using the iHelp Map

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

To use the iHelp Map

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

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

13 Task UI

Task UI

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

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

About Task User Interface

Task UI is a wizard-like user interface that guides you through task execution. During task execution, you can:

- Navigate back and forward during the task execution.
- Resume or pause the task execution at any point.

Task UI features help increase the efficiency of:

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

Task UI includes the following features that support task execution:

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

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

Using Task UI

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

To use Task UI

1. Click Tasks on the application taskbar.

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

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

Navigational Buttons for Task UI

The following table describes the navigational buttons for the Task UI wizard. Your application might contain additional buttons. Navigation happens on the first click in the Task UI wizard. As a visual cue, the step or chapter name in the task pane is hyperlinked.

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

14 Information Sharing

Information Sharing

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

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

Using the Inbox

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

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

To use the Inbox

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

   The Site Map displays the views available for the Inbox.
3. Click Inbox Items List.
4. In many cases, you can drill down on the Name field hyperlink to see details about the work item.

Running Reports

You run reports in views in your clients (Web client, Mobile Web client, and Developer Web client). While in a view, you can perform a query, and then select the report you want to run. For more information, see *Information Query*.

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

Note: Reports functionality is an optional application extension.

To run a report

1. Navigate to the screen and view that contains the information for which you want to run a report.
2. (Optional) Limit report data by running a query.
3. Click the Reports button on the *application taskbar*.

   The Run Report pane appears.
4. In the Run Report pane, complete the following fields as required:

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

5. Click Submit.

   The designated report runs.
6. Click My Reports to navigate to the Reports view of the BI Publisher Reports screen.

   A record for the run report appears in the Reports view.
7. Drill down on the Report Name field in the Reports view to display the report in a new window.

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

Emailing, Faxing, Paging, and Sending Outbound Wireless Messages

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

- **Send Email.** Click to send an email directly from the application. For more information, see *Outbound Communications Preferences for Send Email*.
- **Send Fax.** Click to send a fax directly from the application.
- **Send a Page.** Click to page someone directly from the application.
- **Send Wireless Message.** Click to send a message to another person's mobile device from the application.

Alternatively, you can send messages by clicking Share on the *application toolbar* and selecting an option. For more information, see *Sending Messages*.

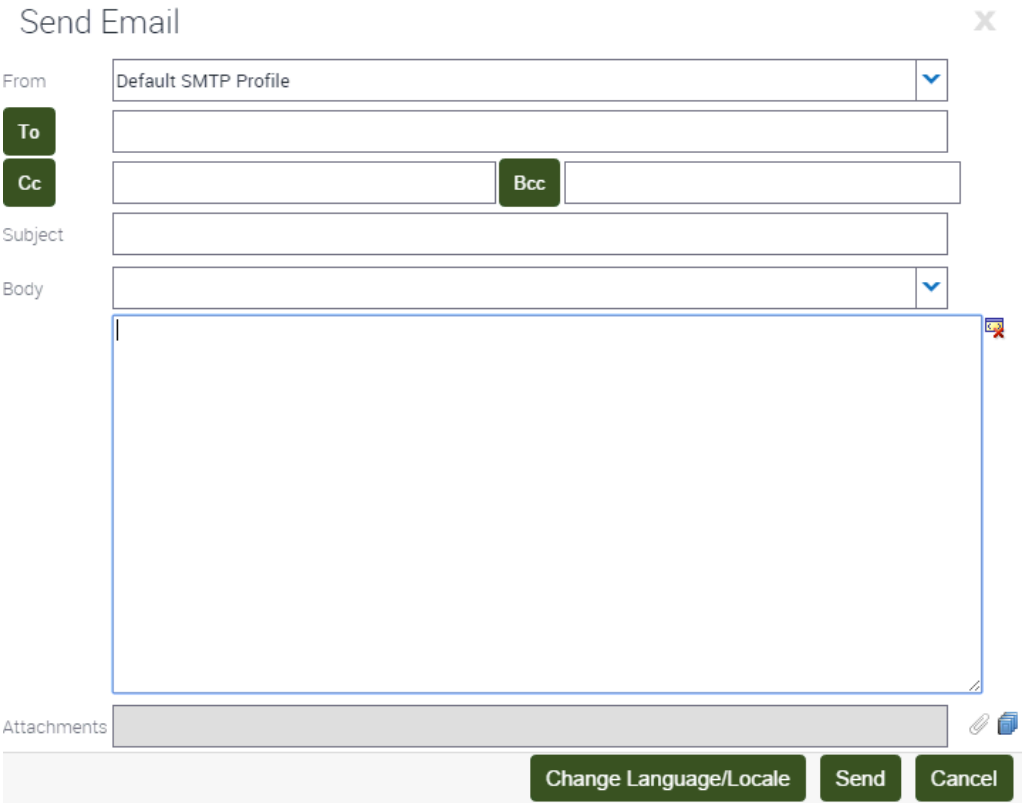
Sending a fax, page, or an outbound wireless message is similar to sending an email. If you cannot send a fax, page, or outbound wireless message, then contact your administrator.

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

Sending Email from Applications

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

The following image shows an example of the Send Email dialog box.



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

To send an email from the application

1. Navigate to the screen that you want.
2. Select the record for which you want to send the email.

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

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

   The Send Email dialog box appears.

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

4. Complete the fields in the dialog box as required.

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

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

5. (Optional) Complete the following additional steps:

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

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

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

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

6. Click Send to send the email.

Using the HTML Editor

You can set your user preferences to allow you to use the HTML editor in the Send Email dialog box. For more information, see *Outbound Communications Preferences for Send Email*.

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

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

About Outlook (F9) Integration

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

Creating Bookmarks

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

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

To add a bookmark to an email or a document

1. Navigate to and select the record to which you want to create a link.
2. To create a bookmark from the URL in the browser, select the URL in the address field of the browser, and then copy and paste this URL to an email or document.

Importing Data into Applications

You can import data into only certain parts of the 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.

To import accounts or opportunities, then contact your administrator. You can import a maximum of 2000 records at the same 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 feature from a view.

2. Click Menu (the cogwheel icon), and then click Import.

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

      A dialog box appears.
   b. Select the file you want to import, and click Open.
   c. Use the Input Format option buttons to select the format of the input source file.

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

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

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

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

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

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

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

   The records from the import file are imported into the database. When the import finishes, a status dialog box appears.
6. Click OK to close the dialog box, or click View Log to review information about the import.

Exporting Data to an External File

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

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

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

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

To export data to an external file

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

   For more information, see *Organizing List Columns*.
3. Click Menu (the cogwheel icon), and then click Export.

   The Export dialog box appears.

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

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

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

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

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

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

    c. Click Next.

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

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

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

6. Click Close in the Export dialog box.

15 Calendar

Calendar

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

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

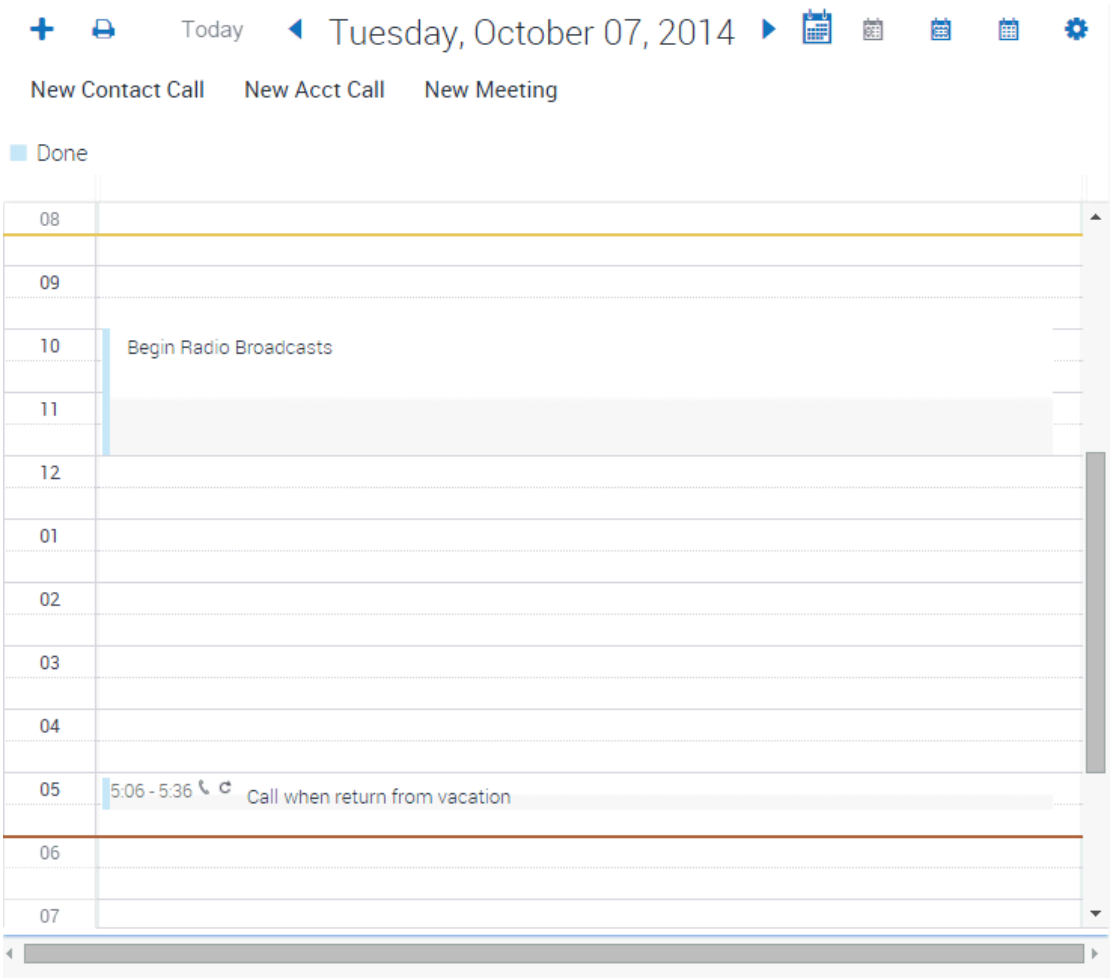
About the Calendar

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

Note the following about using calendar:

- An explicit click is required to make a date selection in the calendar.
- The current date is not assumed as the default date.
- Calendar does not show a time zone drop down list for Sales Orders.
- A 7 day view is not available for calendar.

The following image shows an example of the Calendar screen.



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

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

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

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

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

Calendar Formats

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

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

If the current date appears in the calendar format, then that date is automatically selected and highlighted when you access a calendar. If you click a time slot in the calendar, then that time slot is also highlighted.

You can navigate to a date from a calendar format in the following way:

- Click the navigation buttons on either side of the calendar title to navigate to the previous calendar interval or to the next calendar interval as required.

  The calendar title determines the calendar interval to which you navigate. For example, if the calendar title is August 6 - 12, 2012, then the calendar is in the weekly calendar format.
- Click the Today link to navigate to the current date when the current date does not appear in the displayed calendar format.
- Click the calendar select button to navigate to a date. This date does not have to appear in the displayed calendar format.

  When you click the calendar select button, you access the calendar control. Unlike the calendar control for fields, the calendar control for the Calendar screen does not include an OK button and a Now button that you can click to select a date. In the calendar control for the Calendar screen, you click a date to select the date. For more information about the calendar control, see *Calendar Control*.
- In the monthly calendar format, click a date in the calendar.

Calendar Views

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

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

You can navigate to a date in Calendar views in the same way that you navigate to a date in Calendar screens. For more information about this date navigation, see *Calendar Formats*.

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

Viewing Activities

Activities appear in the Activities screen, in the Calendar, and in the To Do list. The place where an activity appears depends on the place where you create it. The following table explains where activities appear.

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

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

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

You cannot query for activities in the calendar.

About Activity Defaults

When you create a new calendar activity, some fields are populated with default values. The following table describes these values as they appear in a preconfigured application.

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

Recurring Activity Defaults

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

The following table shows the default values for the End By field. For more information about recurring activities, see *Creating Recurring Calendar Activities*.

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

Viewing Calendar Activities

You can view and manage activities in the daily, weekly, or monthly format of your calendar. You can specify any of the calendar formats as the default format in the Calendar screen. For more information, see *Default Calendar Formats*.

Note: You cannot query for activities in the calendar.

To view calendar activities

1. Navigate to the Calendar screen.

   The calendar appears, showing the daily calendar format.
2. (Optional) Click a button to change the calendar format.

   For more information, see *Calendar Formats*.
3. Place your cursor over the hyperlink for an activity description to view details about that activity.

Adding Activities to the Calendar

You can add activities to any time slot in the calendar. You can designate the time for your work hours in your user preferences. For more information, see *Length of a Workday*.

To add an activity to the calendar

1. Navigate to the Calendar screen.
2. (Optional) Navigate to a date in the calendar.

   If you complete this step, then the value in the Start field of the Calendar Detail form includes the date to which you navigate. The Calendar Detail form appears when you complete the next step. For information about navigating to a date in the calendar, see *Calendar Formats*.
3. In the daily, weekly, or monthly calendar format, click New Record (the plus (+) icon).

   The Calendar Detail form appears.
4. Complete the fields.
5. Click Save This One.

   The activity appears in your calendar and in the Activities screen.

Entering Activities Directly in the Calendar

In the daily and weekly calendar format, you can enter an activity directly in the calendar.

To enter an activity directly in the calendar

1. Navigate to the Calendar screen.
2. In the daily or weekly calendar format, click the time slot for which you want to create the activity.

   To create an activity that spans multiple time slots, then click the first time slot and with the mouse button depressed, move the activity to the last time slot and then release the mouse button.
3. In the New Event dialog box, enter a description, and click OK.

   The activity appears in your calendar and in the Activities screen.

Deleting Calendar Activities

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

- Some activities imported from other applications, such as Microsoft Outlook or Microsoft Exchange.
- Activities that you do not own in your calendar.
- Activities that you can only view in the calendars of other users.
- Activities that are protected by industry-specific functionality.

- For example, some call records in the Life Sciences application are read-only. You can delete the call record, but not the calendar activity for the call record.

To delete an activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

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

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

Creating Recurring Calendar Activities

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

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

To create a recurring calendar activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click New Record (the plus (+) icon).
3. Complete the following fields on the Calendar Detail form that appears as required.

Field	Description
Alarm	(Optional) Select this check box to activate an alarm for the activity. A user preference automatically activates the alarm each time you create an activity. For more information, see *Activating Alarms for All Calendar Activities*.
Repeat Type	Select a value to designate how often you want this activity to recur. For more information about the Repeat Type value, see *Recurring Activity Defaults*. Select the appropriate option for the value that you select in the Repeat Type field.
End By	(Optional) Select the date on which you want the activity to stop recurring by selecting this option and clicking the Calendar button in the field.

4. Click Save This One.

Changing Recurring Activities to Nonrecurring Activities

You can change a recurring activity to a nonrecurring activity.

To change a recurring activity to a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.
3. From the drop-down list for the Repeat Type field, choose Non-Repeating.
4. Click Save All.

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

Deleting Recurring Calendar Activities

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

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

To delete a recurring activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.
3. Do one of the following:
   - Click Delete This One.

     Deletes the current instance of the activity. Every other instance is still scheduled
   - Click Delete All.

     Deletes every instance of the recurring activity from the current day forward. Any instances of the recurring activity before the current day remain on the calendar.

Adding Activities in the To Do List

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

To Do activities have the following characteristics:

- They are activities that have a Type field value of To Do.
- They carry forward every day until they are marked complete.
- They do not appear in the Calendar itself.

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

To add a To Do activity

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

Marking To Do Activities Complete

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

To mark a To Do activity as complete

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

Changing Activities

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

- *Changing Nonrecurring Activities*
- *Changing Recurring Activities*

Changing Nonrecurring Activities

Complete the procedure in this topic to change nonrecurring activities.

Note: Each time you create or modify an activity in the calendar, you can choose to automatically notify any employees who are associated with the activity. For more information, see *Email Prompts for Meetings*.

To change a nonrecurring activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

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

Changing Recurring Activities

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

To change a recurring activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.
3. Make the necessary changes, and click one of the following buttons:

   - **Save This One.** Saves the changes you make to the current recurring activity, changes the activity to a non-recurring activity, and does not change every other recurring activity in the series.

     For example, a recurring activity is scheduled to occur daily from August 21 until August 25. If you change the August 23 instance of the activity and click Save This One, then only the August 23 activity changes. This activity also becomes non-recurring and is no longer associated with the other activities in the series.
   - **Save All.** Saves changes you make to the current recurring activity and to all subsequent recurring activities in the series. However, the changes are not applied to any activities that are scheduled before the current activity.

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

Rescheduling Activities

You can use different methods to reschedule activities, including the following:

- Changing the date fields
- Moving the activity
- Stretching the activity border

Changing Date Fields

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

To reschedule an activity by changing date fields

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.
3. Change the value in the Start field.
4. Change the value in the End field.

Moving Activities

In the daily and weekly calendar format, you can move an activity to reschedule the activity.

To reschedule an activity by moving the activity

1. Navigate to the Calendar screen.
2. In the daily or weekly calendar format, click to select the activity time slot on the calendar and with the mouse button depressed, move the activity to a different time slot on the calendar and then release the mouse button.

Stretching Activity Borders

In the daily and weekly calendar format, you can stretch the cell borders for an activity to reschedule the activity.

To reschedule an activity by stretching the activity border

1. Navigate to the Calendar screen.
2. To change a start time for the activity, do the following:
   a. Place the cursor over the upper border of the activity.

      A line with arrowheads appears.
   b. Click to select the activity's upper border and with the mouse button depressed, move the border to an earlier or later time and then release the mouse button.
3. To change an end time for the activity, do the following:
   a. Place the cursor over the lower border of the activity.

      A line with arrowheads appears.
   b. Click to select the activity's lower border and then move the border to an earlier or later time.

Adding Participants to Activities

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

Participants can also include resources, such as a projector or a conference room. For more information, see *Using the Participant Availability Subview*.

Adding Contacts to Activities

You can add contacts to activities.

To add contacts to an activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participants list beneath it.
3. In the Participants list, click Add Contact.

   The Add Contacts dialog box appears.
4. Select one or more contact records, and then click OK.

   The selected contacts appear in the Participants list and are part of the activity.

Adding Employees to Activities

You can add employees to an activity.

To add employees to an activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participants list beneath it.
3. In the Participants list, click Add Employee.

   The Add Employees dialog box appears. Use Query (the magnifying glass icon) in the Employees list to find an employee as required.
4. Select one or more employee records, and then click OK.

   The selected employees appear in the Participants list and are part of the activity.
5. (Optional) Review the Participants list to verify an employee's availability.

Adding Resources to Activities

You can add resources to an activity.

To add resources to an activity

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

Removing Participants from Activities

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

Removing Contacts from Activities

You can remove contacts from activities.

To remove contacts from an activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.
   The Calendar Detail form appears with the Participants list beneath it.
3. To remove a single contact:
   a. Click the contact name in the Participants list to select the contact.
   b. Click Delete (the trash can icon).
   c. Click OK when prompted to confirm the deletion.
4. To remove multiple contacts:
   a. In the Contacts field of the Calendar Detail form, click the multiple select button.
      The Contacts dialog box appears showing a list of Available and a list of Selected contacts for the activity.

b. In the Selected list, do one of the following:
   - Select the contact that you want to remove from the activity, and then click Remove (the single arrow pointing backward). Repeat as required.
   - Select Remove All (the double arrows pointing backward) to remove all contacts from the activity.

   The removed contacts no longer appear in the list of selected contacts.
c. Click OK.

Removing Employees from Activities

You can remove employees from activities.

To remove employees from an activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears with the Participants list beneath it.
3. To remove a single employee:
   a. Click the employee name in the Participants list to select the employee.
   b. Click Delete (the trash can icon).
   c. Click OK when prompted to confirm the deletion.
4. To remove multiple employees:
   a. In the Employees field of the Calendar Detail form, click the multiple select button.

      The Employees dialog box appears showing a list of Available and a list of Selected employees for the activity.
   b. In the Selected list, do one of the following:
      - Select the employee that you want to remove from the activity, and then click Remove (the single arrow pointing backward). Repeat as required.
      - Select Remove All (the double arrows pointing backward) to remove all employees from the activity.

      The removed employees no longer appear in the list of selected employees.
   c. Click OK.

Removing Resources from Activities

You can remove resources from activities.

To remove resources from an activity

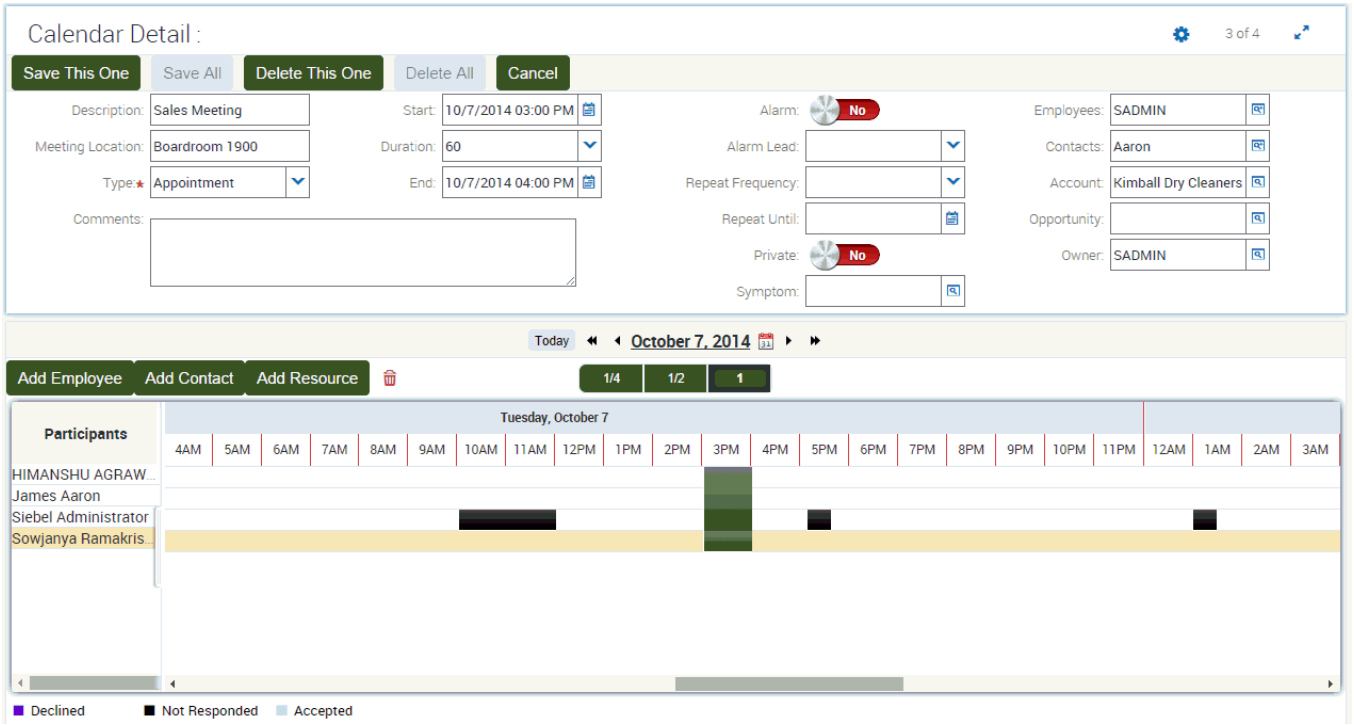
1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

The Calendar Detail form appears with the Participants list beneath it.

3. To remove a resource, do the following:
   a. Click the resource name in the Participants column of the Participant Availability subview to select the resource.
   b. Click Delete (the trash can icon).
   c. Click OK when prompted to confirm the deletion.

Using the Participant Availability Subview

The Participant Availability subview that appears after the Calendar Detail form provides more information about an activity and its participants. The following image shows an example of the participant availability subview.



The following information describes the participant availability subview and how to use it:

- The participant availability subview consists of two panes as follows:
  - The Calendar in the main pane showing activity scheduling information.
  - The Participants list in the side pane.
- Click Add Employee, Add Contact, or Add Resource to add new participants to an activity.
- Click the participant name in the Participants column, and click Delete (the trash can icon) to remove an existing participant from an activity.
- Contacts that appear in this subview have no associated schedules.

- All the schedules you see in the Participant Availability subview are converted to the time zone specified in your time zone preferences. For example, if your calendar displays Pacific time, and you are viewing an activity involving a user in the Eastern time zone, then the Eastern time zone user's schedule is converted to Pacific time for you. If the Eastern time zone user is looking at the same activity in the calendar, then the schedule is converted to Eastern time.
- Navigating to a date in the Participant Availability subview is similar to navigating to a date in the calendar. For more information about calendar navigation, see *Calendar Formats*.
- Double navigation arrows are available to navigate to one week forward or one week back.
- You can advance the schedule to a future date by using the horizontal scroll bar after the schedule. To see more than three days after the activity's current date, then you must reset the start date in the Calendar Detail form.
- Click the hour increment buttons (1/4, 1/2, and 1) to change the time increments that appear in the schedule.
- You can choose to display only your work hours or all 24 hours of the day. For more information, see *Default Display for Participant Schedule*.
- Scheduled activities appear as blocks on the calendar. The blocks are highlighted in the color associated with the Status field of the activity. The color legend shows only those colors that appear in the schedule, not all possible colors.
- The start time of the current activity is denoted with a line, and the end time of the current activity is denoted with a line.
- Any changes you make in the Calendar Detail form are automatically reflected in the Participant Availability subview.

Reassigning Activities

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

To reassign an activity

1. Navigate to the Calendar screen.
2. In the daily, weekly, or monthly calendar format, click the hyperlink for an activity description to access the activity.

   The Calendar Detail form appears.
3. In the Employees field, click the multiple select button.

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

   You must change the primary employee to reassign the activity.
4. If the employee to whom you want to assign the activity does not appear in the Selected list of employees, then select the employee in the Available list of employees, and then click Add (the single arrow pointing forward) to add the employee to the Selected list of employees.
5. When the employee to whom you want to assign the activity appears in the Selected list of employees, do the following:

   a. Click the Primary field in the record for this employee, and then click the check box.

The activity is reassigned.

b. If the previous primary employee is no longer involved with the activity, then access the Employees selection dialog box again, select the employee in the Selected list of employees, and then click Remove (the single arrow pointing backward) to remove the employee from the Selected list of employees.

Using Alarms for Activities

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

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

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

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

Activating Alarms

To activate (or set up) an alarm for an activity, select the Alarm check box in an activity record on any screen that provides an Activities view or in the Calendar screen.

Alarms work correctly only if your computer's time zone setting is the same as the time zone set up in your user preferences. For more information, see *Default Time Zone*.

To activate an alarm for a calendar activity

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

   The Calendar Detail form appears.
3. Select the Alarm check box

   The Alarm Lead field is automatically populated with the default lead time set up in your user preferences. For more information, see *Default Alarm Lead Times*.
4. To change the lead time, select a value from the drop-down list for the Alarm Lead field.
5. Click Save This One.

   An alarm icon appears next to the hyperlink for the description of the activity in the calendar.

Note: You might want alarms to trigger for every calendar activity you create. You can perform this setup in your user preferences. For more information, see *Activating Alarms for All Calendar Activities*.

Postponing and Dismissing Alarms

When an alarm appears on your screen, you can postpone or dismiss it. When you postpone it, you can specify the length of time for the alarm snooze. In your user preferences, you can set a default for the alarm snooze time in all of the activities you create. For more information, see *Default Alarm Snooze Times*.

Postponing Alarms

You can postpone an alarm in the Alarm dialog box.

To postpone an alarm

1. In the Alarm dialog box, choose the length of time for which you want to postpone the alarm from the drop-down list for the Snooze For field.
2. Click Snooze to postpone the alarm.

   The alarm appears again after the amount of time you specify passes.

Dismissing Alarms

You can dismiss an alarm in the Alarm dialog box.

To dismiss an alarm

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

  The alarm does not appear again for the activity.

Note: If multiple alarms appear before you either postpone or dismiss them, then they are all queued behind the same alarm dialog box. You can click the Previous and Next buttons to move to each alarm. You can also click Dismiss All to dismiss every alarm that is currently active, or you can click Snooze All to postpone every alarm that is currently active.

Using the Calendar Details Button

A Calendar Details button is available for Activities in your Web application provided that the Display In field for the selected activity is set to Calendar and Activity. Clicking Calendar Details opens the calendar detail form where you can perform a lot of the same tasks that you can perform from the Calendar screen.

To use the Calendar Details button

1. Log in to your application and navigate to one of the following views:
    - Navigate to the Activities screen, drill down on an activity record, and then go to the More Info subview.
    - Navigate to the Accounts screen, drill down on an account record, go to the Activities subview and then select an activity record.
2. Click the Calendar Details button to open the calendar detail form for the selected activity.

    If you cannot click the Calendar Details button, then the button is disabled for the activity. To enable the Calendar Details button for an activity, set the Display In field for the activity to Calendar and Activity. If there is no Calendar Details button at all in the applet, then the button has not been configured for that applet.
3. Perform one or more of the following tasks as required:
    - To change a recurring activity to a nonrecurring activity, choose Non-Repeating from the drop-down list for the Repeat Type field and then click Save All.
    - To delete a recurring calendar activity, click Delete This One or Delete All. For more information, see *Deleting Recurring Calendar Activities*.
    - To change the calendar activity, make the necessary changes and then click Save This One or Save All. For more information, see *Changing Activities*.
    - To reschedule the calendar activity, change the value in the Start and End fields as required.
    - To add participants to the activity, do one or more of the following as required:
        - Click Add Contact, select one or more contact records, and then click OK.
        - Click Add Employee, select one or more employee records, and then click OK
        - Click Add Resource, select one or more resources, and then click OK.
    - To remove participants from the calendar activity, select the participant and then click Delete (the trash can icon).
    - To activate an alarm for the calendar activity, select the Alarm check box, select a value from the drop-down list for the Alarm Lead field (optional), and then click Save This One. For more information, see *Activating Alarms*.

Granting Access to Your Calendar

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

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

To give others access to your calendar

1. Navigate to the Calendar screen, then the Access List view.

    The Calendar Access list appears.

2. Click New (the plus (+) icon).

   The Add Employees dialog box appears.
3. Select the record for an employee, and then click OK.

   The employee you select appears in the Calendar Access list, and that employee can now view your calendar.
4. (Optional) To allow the employee to add activities to your calendar, select the Allow Updates check box.

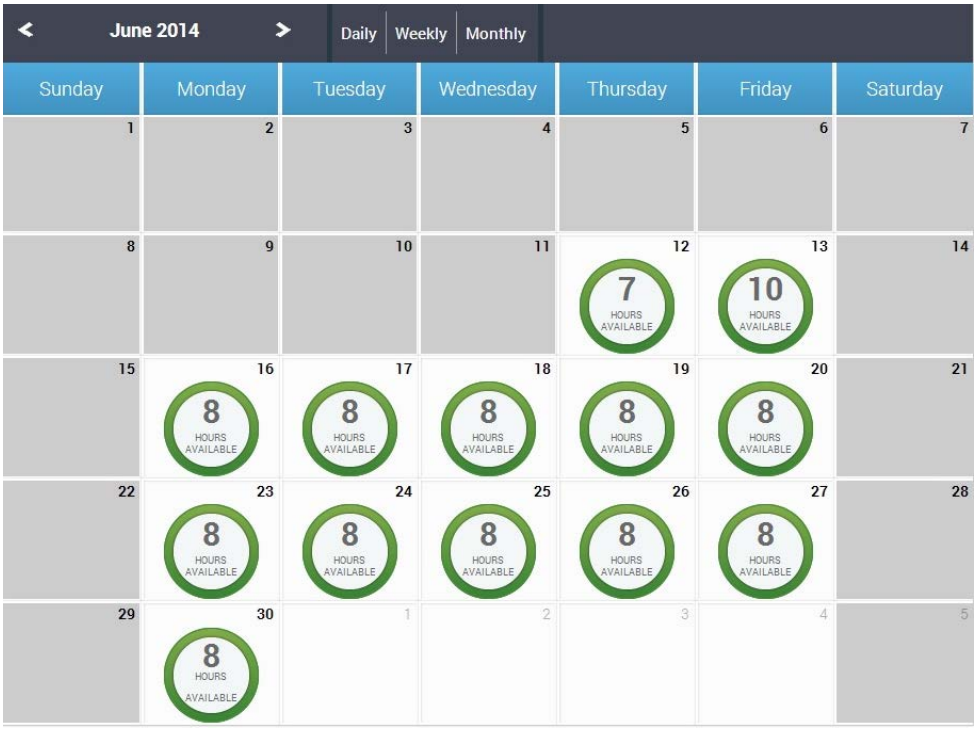
About Using Group Calendars

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

About Viewing Calendar Availability

When trying to find a time to schedule a meeting, you might want to consult a detailing of how many available hours a user has on a particular day. If calendar availability is enabled, then when you open a monthly view of the calendar, it shows the available hours for every day in the future. The available hours for each day are highlighted on the calendar as follows: 8 hours available, 10 hours available, 7 hours available, and so on. These hours are calculated by taking the number of working hours defined by the user, and subtracting the time for any events already scheduled for that day.

The following image shows an example of calendar availability.



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

Saving Charts

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

Use the drop-down list on the chart to determine the data to include in the chart. Most charts also include control buttons representing chart types from which you can select the format of the chart. Supported chart formats include the following: bar chart, pie chart, line chart, stacked bar chart, scatter chart.

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

To save a chart

1. Navigate to the chart you want to save.
2. Right-click the chart, and select Save Image As.
3. In the dialog box that appears, do the following:
   a. Navigate to the location where you want to save the chart.

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

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

16 User Preferences

User Preferences

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

- *About User Preferences*
- *Default Time Zone*
- *Startup View*
- *Navigation Controls*
- *Default Navigation Control*
- *Themes*
- *Transition Effects*
- *Applet Visualization*
- *Scroll Speeds for Tile Applets*
- *Confirmation Before Deleting Records Prompt*
- *Pause Behavior for Task UI*
- *Outbound Communications Preferences for Send Email*
- *Default Queries*
- *Saved Queries*
- *Notifications Setup*
- *View Links for Screen Home Pages*
- *Showing, Hiding, and Reordering Screens or Views*
- *Calendar Setup*
- *Maintaining Quick Fill Templates*
- *User Profile Image Setup*
- *About Setting Up Synchronization Preferences*
- *About Availability Fields in the Profile View*

About User Preferences

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

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

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

Default Time Zone

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

To set a default time zone

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

Startup View

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

To set a startup view

1. From the application-level menu, choose Tools, then User Preferences.
   The User Preferences screen appears.
2. Navigate to the Behavior view.
   The Behavior form appears.
3. In the Startup View field, click the select button.
   The Pick Favorite dialog box appears.
4. From the Startup View list in the Pick Favorite dialog box, select the screen and view you want as your startup view.
   For example, choosing Accounts - Activities shows the Accounts screen, then Activities view when you first launch your application.

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

5. Click OK.
   The screen and view you select appear in the Startup View field the next time you log in to the application.

You must log out and then back in to the application for the changes to take effect.

Navigation Controls

The Side Menu navigation control is used by default in the Web client application. You use the Side Menu navigation control option to access screens from the side menu, views from the second level and third level view bars, and subviews from the fourth level view bar. The other available navigation control options are Tab and Tree.

If you select the Tab navigation control option, then:

- Screen names appear in screen tabs across the screen, at the start of each page.
- In the second level view bar, view names appear in a link bar under the screen tabs.
- In the third level view bar, more view names appear in view tabs lower on the screen.
- In the fourth level subview bar, subview names appear in a link bar under the view tabs lower on the screen.

If you select the Tree navigation control option, then:

- Screen names appear in tree format at the side of the screen.
- In the second level view bar, view names appear under the screen names.
- In the third level view bar, more view names appear in view tabs lower on the screen.
- In the fourth level subview bar, subview names appear when you hover the cursor over a view tab lower on the screen.

If you write with your left hand, then select the tree navigation control option to access screens and views.

To set the navigation control user preference for an application

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

   The Behavior form appears.
3. Select one of the following options from the drop-down list in the Navigation Control field:

Value	Description
Side Menu	Indicates to use the side menu navigation control in the application, where all objects appear in a (side) menu drop-down list in the UI.
Tab	Indicates to use the tab navigation control in the application, where all objects appear in tab format in the UI.
Tree	Indicates to use the tree navigation control in the application, where all objects appear in tree format in the UI.

You must log out and then back in to the application for the changes to take effect.

Default Navigation Control

If the navigation control user preference has not been set, then the DefaultNavigation component parameter sets the default navigation control in the Web client application. The DefaultNavigation component parameter is set to NAVIGATION_SIDE by default, which means that the Side Menu navigation control is used by default in the application. You can change the DefaultNavigation component parameter setting if required as shown in the following procedure.

Note: The navigation control user preference, if set (see *Navigation Controls*), takes precedence over the DefaultNavigation component parameter value.

To set the default navigation control component parameter for an application

1. Start the Siebel client application with administrator privileges.
2. Navigate to the Administration - Server Configuration screen, then the Servers view and select the Siebel Server.
3. In the Components List, query for the Call Center Application Object Manager component in the Component field.
4. Go to the Parameters tab.
5. In the Parameters list, query for DefaultNavigation in the Parameter field.
6. Set DefaultNavigation to one of the following values as required:

Value	Description
NAVIGATION_SIDE	Indicates to use the side menu navigation control by default in the application, where all objects appear in a (side) menu drop-down list in the UI. NAVIGATION_SIDE is the default setting.
NAVIGATION_TAB	Indicates to use the tab navigation control by default in the application, where all objects appear in tab format in the UI.
NAVIGATION_TREE	Indicates to use the tree navigation control by default in the application, where all objects appear in tree format in the UI.

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

Note: Changing the value of the DefaultNavigation component parameter will not affect the performance of the Siebel Web Tools application in any way.

Themes

By default, the Web client uses the Aurora theme as the user interface theme. Depending on the deployment of your Web application, other themes, such as Synergy, Sky Blue, or Simplified User Interface (SUI) might be available. All themes generally have the same capabilities and you can modify the end user experience to match other applications at a site.

Note: The Sky Blue UI theme is available in Siebel CRM 18.7 Update and later releases.

To set the theme for an application

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

   The Behavior form appears.
3. Select the appropriate value from the drop-down list in the Theme field.

   The values available in the Theme drop-down list depend on the value selected in the Navigation Control field as follows:

Application	Navigation Control Selected	Themes Available
Siebel Desktop applications	Tab	Aurora, Sky Blue, Synergy, Vanilla
Siebel Desktop applications	Tree	Aurora
Siebel Desktop applications **Note:** Web Tools supports only the Side Menu+Aurora option.	Side Menu	Aurora
Siebel Mobile applications	Tab	Sky Blue, Synergy, Vanilla **Note:** These themes are available only for the following Siebel Mobile applications: ePharma Mobile, Sales Mobile, and FINS Mobile.

Application	Navigation Control Selected	Themes Available
Siebel Mobile applications	Side Menu	Aurora, Zante **Note:** The Siebel Mobile applications for Siebel Pharma, Siebel Sales and Siebel Finance use the Aurora UI theme by default. The Siebel Mobile applications for Siebel Field Service, Siebel Consumer Goods and Siebel Clinical use the Zante UI theme by default.

4. Log out of the application and then back in for the changes to take effect.

About the Simplified User Interface

The Simplified User Interface is available as an alternative theme for the Web client. Although the Simplified UI is not the default theme, you can configure your Web client to use this theme.

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

- The home page contains familiar elements, such as, My Quotes and the application toolbar.
- The home page contains a series of Springboard icons (such as, Home, Accounts, Contacts, Calendar, Opportunities, and so on) that you can click or tap to access a particular screen.

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

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

Transition Effects

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

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

To set the transition effects

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

The Behavior form appears.

3. From the drop-down list for the Transition field, choose from the available options.

   You must log out and then back in to the application for the changes to take effect.

Applet Visualization

Visualization is a type of configuration that specifies the layout to use to display the information in an applet. Card, Compact, Detail, List, and Map are all examples of an applet visualization.

To set the applet visualization

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

   The Behavior form appears.
3. From the drop-down list for the Visualization field, choose from the available options.

   You must log out and then back in to the application for the changes to take effect.

For more information about configuring and changing the applet visualization, see *Configuring Siebel Open UI* .

Scroll Speeds for Tile Applets

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

To set the scroll speeds for tile applets

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

   The Behavior form appears.
3. Select a value from the drop-down list for the Default Scroll Speed field.

   You must log out and then back in to the application for the changes to take effect.

Confirmation Before Deleting Records Prompt

You can set a prompt to appear when deleting records asking for confirmation to delete the records.

To set the confirmation before deleting records prompt

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

   The Behavior form appears.
3. Select the check box for the Confirm Before Deleting Record field.

Pause Behavior for Task UI

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

To set the pause behavior for Task UI

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

   The User Preferences screen appears.
2. Navigate to the Behavior view.

   The Behavior form appears.
3. Select the check box for the Prompt to Pause When a User Interrupts a Task field.

Outbound Communications Preferences for Send Email

This topic describes how to set user preferences that affect the Send Email command. For more information about sending email, see *Sending Email from Applications*. For information about supported versions of Microsoft Outlook and Lotus Notes email client software, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.



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

To set outbound communications preferences for Send Email

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

   The User Preferences screen appears.
2. Navigate to the Outbound Communications view.

   The Outbound Communications form appears.
3. In the Send Email section, complete the following fields as required:

Field	Description
Upon Sending Messages Generate	Select activity generation for messages sent using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. Options are: o **No Activities.** Sending an outbound message generates no activity records. o **Private activities.** Sets the Internal flag to TRUE for an activity record generated by sending an outbound message. Only the message sender can view the activity record. o **Public activities.** Sets the Internal flag to FALSE for an activity record generated by sending an outbound message. Other users, in addition to the message sender, can view the activity record. The specific results of the Internal (FALSE or TRUE) flag depend on your application implementation. For more information, contact your administrator.
Default Profile	Select the default communications profile to use for the Send Email and Send Fax commands. The profile stores various communications settings and provides access to the communications driver that transfers information between the application and the email/fax server. For example, a profile for the Internet SMTP/POP3 Server driver handles outbound communications using the SMTP protocol. You can access any profiles that are associated with your responsibility setting, and any profiles that you create for your personal use by using the My Profiles view in the Communications screen. The ability to create personal communications profiles is not available for some responsibility settings. The default profile information is copied to the From field in the Send Email and Send Fax dialog boxes. You can specify a different profile by choosing another value from the drop-down list for the From field.
Default Recipient Class	Select the default choice for where recipient email or fax address information is populated in an outbound message. Options are: To, Cc, and Bcc. In some contexts, the Send Email and Send Fax commands allow you to choose email or fax recipients from data stored in certain fields of the current record. This field applies if you choose a recipient for one of these current field values. For example, you might generally want to populate recipients to the To field. However, because of your typical activities or workflow and your company's business needs, it

Field	Description
	might be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.
Email Client	Select the email client to use when the Send Email command is selected. Options are: Lotus Notes, Microsoft Outlook, Email Client, and External Email Client.
Siebel/Outlook Form	Select your preferred outbound email form when Email Client is set to Microsoft Outlook, if you prefer a default form other than the form specified by the administrator at the server level. For information about creating outbound forms, see *Siebel Email Administration Guide* .
Siebel/Lotus Form	Select your preferred outbound email form when Email Client is set to Lotus Notes, if you prefer a default form other than the form specified by the administrator at the server level. For information about creating outbound forms, see *Siebel Email Administration Guide* .
Default Message Format	Select the type of formatting to use for outbound email messages that are sent using the Send Email command. Options are HTML and Plain Text. For more information about using the HTML message format, see *Using the HTML Editor*.

Default Queries

You can set up queries to display data when you access a specific screen and view. For more information about queries, see *Information Query*.

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

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

To set up a default query

1. From the application-level menu, choose Tools, then User Preferences.
   The User Preferences screen appears.
2. Navigate to the Default Queries view.
   This view contains two applets:

- **Screen.** This applet lists the screens and contains one field: Screen Name.
- **Screen View.** This applet lists the screen views and contains two fields: View Name and Default Query.

The Screen View list changes according to the screen you select in the Screen applet.

3. In the Screen applet, select the screen.

   For example, if you select the Contacts screen, then all contact screen views appear in the Screen View applet.
4. In the Screen View applet, select a view.
5. Click the Default Query field for the view you selected, and then click the select button.

   The Pick Query dialog box appears.
6. From the Pick Query dialog box, select the query you want the view to show, and then click OK.

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

Saved Queries

You can view existing queries that you previously saved. For more information about queries, see *Information Query*.

To view a saved query

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

   The User Preferences screen appears.
2. Navigate to the Saved Queries view.

   The Saved Queries list appears.

Notifications Setup

If your administrator provides you with the proper authority, then you can set up certain aspects of notifications. For information about reviewing notifications, see *Notifications*.

To set up notifications

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

   The User Preferences screen appears.
2. Navigate to the Message Broadcasting view.

   The Message Broadcasting form appears.
3. In the Message Broadcasting form, complete the following fields as required:

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

Field	Description
Show	Select this check box to show the functionality for notifications in the application window. This field applies to the Notification button and notification pane.

View Links for Screen Home Pages

You can set up view links to appear in the view links area in screen home pages. For more information about the main elements in home pages, see *Home Pages for Screens*.

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

To add a view link to a screen home page

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

   The User Preferences screen appears.
2. Navigate to the View Links view.

   The Screen Homepages list appears.
3. In the Screen Homepages list, select the home page for which you want to add a view link.

   If view links exist for the home page, then the View Links list shows those links.
4. In the View Links list, click New (the plus (+) icon).
5. Complete the following fields as required:

Field	Description
Sequence	Type a number that determines the place of the link in the view links area of the screen home page.
Active	Select this check box to indicate this link is an active view link.
Name	Type a name for the link.
Description	Type a long description for the link.
View	Select a view in the Pick Screen View dialog box that appears when you click the select button in this field.
Default Query	Select a default predefined query for the view you select in the View field.

Field	Description

Showing, Hiding, and Reordering Screens or Views

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

Showing or Hiding Screens

The following procedure shows you how to show or hide screens.

To show or hide screens

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

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

Showing or Hiding Views

The following procedure shows you how to show or hide views.

To show or hide views

1. From the application-level menu, choose Tools, then User Preferences.
   The User Preferences screen appears.
2. Navigate to the Tab Layout view.
   The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the record for the screen associated with the view you want to show or hide.
   The View Tab Layout list shows the views for the selected screen.
4. In the View Tab Layout list, select the record for the view you want to show or hide, and do one of the following:

- Clear the Hide check box to show the view.
- Select the Hide check box to hide the view.

Changing the Order of Screens

You can change the order in which screens appear.

To change the order in which screens appear

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

   The User Preferences screen appears.
2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, type a whole number in the Order field for each screen to define the position of that screen.

   Use the number in the Order field to re-sequence the screens in ascending order. If you use the same number in the Order field for more than one screen, then the screens with the same number appear in alphabetical order.

Changing the Order of Views

You can change the order in which views appear.

To change the order in which views appear

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

   The User Preferences screen appears.
2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the record for the screen for which you want to reorder views.

   The View Tab Layout list shows the views for the selected screen.
4. In the View Tab Layout list, type a whole number in the Order field for each view to define the position of that view.

   Use the number in the Order field to re-sequence the views in ascending order. If you use the same number in the Order field for more than one view, then the views with the same number appear in alphabetical order.

Setting Up Default Views for Screens

You can set up a default view for a screen.

To set up a default view for a screen

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

   The User Preferences screen appears.
2. Navigate to the Tab Layout view.

   The Screen Tab Layout and View Tab Layout lists appear.
3. In the Screen Tab Layout list, select the screen for which you want to set up a default view.
4. In the View Tab Layout list, select the Default View check box for the view you want as the default view for the screen.

Calendar Setup

To better suit your needs, you can set up aspects of your calendar from the Calendar view of the User Preferences screen. For information about using the calendar, see *Calendar*.

This topic contains information about the following:

- *Length of a Workday*
- *Default Calendar Activity Duration*
- *Activating Alarms for All Calendar Activities*
- *Default Alarm Lead Times*
- *Default Alarm Snooze Times*
- *Email Prompts for Meetings*
- *Default Calendar Formats*
- *Setting Up Another User's Calendar as Your Default Calendar*
- *Default Display for Participant Schedule*

Length of a Workday

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



Note: If you are viewing the current day, then the (start time) line represents the current time, if the current time is later than the value specified in your Working Hours Start At preference setting. Otherwise, the (start time) line represents the value specified in your Working Hours Start At preference setting.

To change the start time and end time of your workday

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

   The User Preferences screen appears.
2. Navigate to the Calendar view.

The Calendar form appears.
3. Enter the calendar start time in the Working Hours Start At field.
4. Enter the calendar end time in the Working Hours End At field.

Default Calendar Activity Duration

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

To set up a default calendar activity duration

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

   The User Preferences screen appears.
2. Navigate to the Calendar view.

   The Calendar form appears.
3. From the drop-down list for the Appointment Duration field, select the activity length (in minutes).

Activating Alarms for All Calendar Activities

Alarms notify users of upcoming activities. You can specify this alarm activation for every calendar activity you create.

To activate alarms for all calendar activities

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

   The User Preferences screen appears.
2. On the link bar, click Calendar.

   The Calendar form appears.
3. Select the check box for the Default Alarm field.

> **Note:** Clear the Default Alarm check box to inactivate alarms for all activities. Only activities you create after you clear the Default Alarm check box are inactivated.

Default Alarm Lead Times

You can specify an amount of time before the start of an activity to designate when alarm notification occurs.

To set up the default alarm lead time

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

   The User Preferences screen appears.
2. On the link bar, click Calendar.

The Calendar form appears.

3. From the drop-down lists for the Alarm Lead Time field, select a time between 5 and 120 minutes.

   Instead of minutes, you can select hours, days, and weeks. The time that you select is the time interval before appointments or reminders that all alarms trigger.

Default Alarm Snooze Times

You can set up one snooze time for all your alarms.

To set up a default snooze time

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

   The User Preferences screen appears.
2. On the link bar, click Calendar.

   The Calendar screen appears.
3. From the drop-down lists for the Snooze Period field, select a time between 15 and 120 minutes.

   Instead of minutes, you can select hours, days, and weeks. The time that you select is the time interval before alarms trigger a second time after postponing them.

Email Prompts for Meetings

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

To set up an email prompt for a meeting

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

   The User Preferences screen appears.
2. Navigate to the Calendar view.

   The Calendar form appears.
3. Select the check box for the Participant Email Prompt field.

Default Calendar Formats

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

To set up a default calendar format

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

The User Preferences screen appears.

2. Navigate to the Calendar view.

   The Calendar form appears.

3. From the drop-down list for the Default Calendar field, choose Daily, Weekly, or Monthly.
4. If you select Daily as the Default Calendar, then select the time interval for activity periods in the calendar from the drop-down list for the Time Interval (Minutes) field.
5. If you select Weekly as the Default Calendar, then do the following:
   a. Select the default weekly calendar format from the drop-down list for the Weekly Calendar View field.
   b. Select the time interval for activity periods in the calendar from the drop-down list for the Time Interval (Minutes) field.
   c. In the Workdays section, select the week days to appear in the calendar from the check boxes for each day of the week.
6. If you select Monthly as the Default Calendar, then make no further selections.

Setting Up Another User's Calendar as Your Default Calendar

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

To set up another user's calendar as your default

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

   The User Preferences screen appears.

2. Navigate to the Calendar view.

   The Calendar form appears.

3. Click the select button in the Default User field.

   The Pick Default User dialog box appears.

4. Select the appropriate user, and click OK.

   That user's login appears in the Default User field, and that user's calendar appears as your default calendar in the Calendar screen.

Default Display for Participant Schedule

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

To set up a default display for the participant schedule

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

   The User Preferences screen appears.

2. Navigate to the Calendar view.

The Calendar form appears.

3. From the drop-down list for the Participant Chart Display field, choose Working Hours or 24 Hours.

Maintaining Quick Fill Templates

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

This topic contains information about the following:

- *Renaming Quick Fill Templates*
- *Deactivating Quick Fill Templates*
- *Reactivating Quick Fill Templates*
- *Deleting Quick Fill Templates*
- *Adding Quick Fill Template Options in an Applet Menu*

Renaming Quick Fill Templates

You can rename a quick fill template.

To rename a quick fill template

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

   The User Preferences screen appears.
2. Navigate to the Quick Fill Templates view.

   The Templates list appears.
3. Select the template you want to rename.
4. In the Template Name field, type a name for the quick fill template.
5. (Optional) In the Description field, change the description of the template.

Deactivating Quick Fill Templates

You can deactivate a quick fill template.

To deactivate a quick fill template

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

   The User Preferences screen appears.
2. Navigate to the Quick Fill Templates view.

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

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

Reactivating Quick Fill Templates

You can reactivate a quick fill template.

To reactivate a quick fill template

1. From the application-level menu, choose Tools, then User Preferences.
   The User Preferences screen appears.
2. Navigate to the Quick Fill Templates view.
   The Templates list appears.
3. Select the template you want to reactivate.
4. In the Active field, select the check box.
   The template is now available for selection when you create a record from a quick fill template.

Deleting Quick Fill Templates

You can permanently delete a quick fill template.

To permanently delete a quick fill template

1. From the application-level menu, choose Tools, then User Preferences.
   The User Preferences screen appears.
2. Navigate to the Quick Fill Templates view.
   The Templates list appears.
3. In the Templates list, select the quick fill template you want to delete, and then click Delete (the trash can icon).
4. At the confirmation dialog box, click OK.

Adding Quick Fill Template Options in an Applet Menu

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

To add Quick Fill Template options in an applet menu

1. In Siebel Tools, select the applet to which you want to add the quick fill template options.
2. Navigate to the Applet Method Menu Items list for the applet.
   An Applet Method Menu Item defines a menu item in the applet-level menu for the parent Applet object definition. For more information about Applet Method Menu Items, contact your administrator.

3. In the Applet Method Menu Items list, add the following records:

Command Field Value	Menu Text Field Value
ApplyTemplate	Apply Template
SaveTemplate	Save as Template
NewFromTemplate	New From Template
NewFromLastTemplate	NewFromLastTemplate

User Profile Image Setup

The following procedure shows you how to set a user profile image for your application, which involves uploading a user profile image to the server. This uploaded user profile image will appear, instead of the default generic photo, for the Settings button on the *application toolbar*.

To upload a user profile image to server

1. Navigate to the Administration - User screen, then the Persons view.
2. Select the record whose user profile image you want to personalize.
3. Go to the Image field on the form that appears and do one of the following as required:
   - Type the full relative path to an image on a local server, for example, as follows:

     ```
     c:/images/photo.png
     ```
   - Type the full URL address to an image stored externally, for example, as follows:

     ```
     http://<xyz.server.com>/-7rbVFtLM9yE/AAAAAAAAAAI/AAAAAAAAAAA/lCL18P-yc8I/s96-c/photo.jpg
     ```
4. Save the changes when finished.

   When the user next logs in to the application, Settings on the application banner shows the logged in user's profile image that is uploaded to the server, and not the default generic photo.

About Setting Up Synchronization Preferences

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

About Availability Fields in the Profile View

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

17 CTI Toolbar

CTI Toolbar

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

- *Logging In to the Communications System*
- *Logging Out of the Communications System*
- *Receiving Inbound Work Items*
- *Initiating Work Items*
- *Releasing Work Items*
- *Transferring or Conferencing Work Items*
- *Forwarding Work Items*
- *Changing the Ready State*

Logging In to the Communications System

This procedure describes how to log in to the communications system.

To log in to the communications system manually

- After starting the application, click Log In.

Logging Out of the Communications System

This procedure describes how to log in out of the communications system.

To log out of the communications system

- Click Log Out.

Receiving Inbound Work Items

When an inbound work item arrives for you, the Accept Work Item button blinks, and you can accept and begin working on the item.

The Accept Work Item button shows what type of work item is coming in: a Phone icon represents a voice call, an Envelope icon represents an email message, and so on.

When an inbound work item arrives, the following events might also occur:

- Customer data might be displayed in the customer dashboard.
- A screen with relevant data might appear, or you might have to navigate to the appropriate part of the application.

Accepting an Inbound Work Item

This procedure describes how to accept an inbound work item.

To accept an inbound work item

- Click Accept Work Item when the button blinks to indicate the arrival of a work item.

  You can have multiple work items at the same time, such as voice calls on hold or other paused work items. However, only one work item is active at a time. The channel type of the active work item appears on the side of the communications toolbar.

Releasing an Inbound Work Item

This procedure describes how to release an inbound work item.

To release the current work item

1. Select the work item from the Work Items list.
2. Click Release Work Item, as appropriate for the channel type for the work item.

Note: If you are working with an activity record or another type of record that is automatically associated with a work item, then you must save any changes to the record before you release the work item. In addition, to make changes after releasing the work item, you must first refresh the record. Otherwise, changes you make to the record might be lost.

Initiating Work Items

You can initiate communications work items, such as voice calls or email messages, from the communications toolbar. Use the Initiate Work Item button to choose the channel type for the work item.

Note: Using the Send Email, Send Fax, Send Wireless Message, or Send Page commands in the File menu is equivalent to using the communications toolbar to initiate these activities.

To initiate a work item

1. Optionally, specify the recipient for the work item by selecting a contact or employee record, or by entering a phone number into the text input field.

   Note: Recipient information entered into the text input field of the communications toolbar applies to initiating voice calls only. It does not apply to initiating email, fax, wireless, or page messages.

2. Do one of the following:
   - If no work item has been initiated within the current session, then click Initiate Work Item to initiate a work item of the channel type that corresponds to the current context.
   - If a work item of a particular channel was previously initiated, then click the Initiate Work Item button to initiate another work item of the same channel type.
   - To choose the channel type explicitly, click the arrow next to Initiate Work Item, and then select a supported channel type from the displayed menu.
   - In some cases, you can initiate a voice call to a contact by clicking a hyperlink phone number in a list or by clicking a phone button next to a phone number in a form. This action does not use the communications toolbar.
3. If you did not specify contact information first, then do so now in the dialog box that appears.

Releasing Work Items

This procedure describes how to release the current work item.

To release the current work item

1. Select the work item from the Work Items list.
2. Click Release Work Item, as appropriate for the channel type for the work item.

Note: If you are working with an activity record or another type of record that is automatically associated with a work item, then you must save any changes to the record before you release the work item. In addition, to make changes after releasing the work item, you must first refresh the record. Otherwise, changes you make to the record might be lost.

Transferring or Conferencing Work Items

You can transfer a current work item to another person (such as when you want to escalate an item to a supervisor, or conference another person into a customer call). For more information, see the following topics:

- *Performing a Blind Transfer on an Active Work Item*
- *Performing a Consultative Transfer on an Active Voice Call*

Performing a Blind Transfer on the Active Work Item

This procedure describes how to perform a blind transfer on an active work item.

To perform a blind transfer on the active work item

1. Specify the person to whom you want to transfer the active work item by selecting an employee record or by entering contact information, such as phone extension, in the text input field.
2. Click Blind Transfer.

   The work item is released immediately.

Performing a Consultative Transfer on the Active Voice Call

This procedure describes how to perform a consultative transfer on an active voice call.

To perform a consultative (two-step) transfer on the active voice call

1. Specify the person to whom you want to transfer the active voice call by selecting an employee record or by entering the recipient's extension in the text input field.
2. Click Consultative Transfer.

   The current call is paused, and the transfer recipient is dialed.
3. Do one of the following:

   - When the transfer recipient answers and indicates acceptance of the transfer, click Consultative Transfer again (toggle the button) to complete the transfer and release the call.
   - If the transfer recipient does not accept the transfer, then click Retrieve Call to retrieve the call.

Creating a Conference for the Active Voice Call

This procedure describes how to create a conference for the active voice call.

To create a conference for the active voice call

1. Specify the person with whom you want to conference the active voice call by selecting an employee record or by entering the recipient's extension in the text input field.
2. Click Conference.

   The current call is paused, and the conference recipient is dialed.
3. Do one of the following:

   - When the conference recipient answers and indicates acceptance of the conference, click Conference again (toggle the button) to complete the conference and include all parties on the active call.
   - If the conference recipient does not accept the conference, then click Retrieve Call to retrieve the call.
4. Repeat step 1 through step 3 to add participants, as appropriate.

Pausing the Active Work Item

This procedure describes how to pause the active work item.

To pause the active work item

- Click Pause Work Item.

  A voice call is put on hold, or a work item of another channel is paused, until you resume it.

Resuming a Paused Work Item

This procedure describes how to resume a paused work item.

To resume a paused work item

1. If you have an active work item, then pause it, as described earlier.
2. Select a work item from the Work Items list.
3. Click Resume Work Item to activate the selected work item.

Forwarding Work Items

You can have inbound work items of supported channel types forwarded to you, such as having voice calls forwarded to you at a different extension. Only work items subsequently routed to you are forwarded. The toolbar button is a toggle, where the button name changes depending on the state.

To specify forwarding for inbound work items

1. In the text input field, enter the contact information, such as a phone extension, where you want your work items forwarded.
2. Click Forward Work Items.
3. Toggle the button to cancel forwarding.

Changing the Ready State

You can specify that you are unavailable to receive new inbound work items of each supported channel type (such as when you need time to complete after-call work, or you are taking a break). For each channel type, new work items are not assigned to you while the Not Ready state is set for that channel.

You can choose Change Ready State separately for each channel type, or for work items of all supported channel types. The toolbar button is a toggle.

If all channels are in Not Ready state, then the button is toggled down (appearing to be depressed). If any, or all, channels are in Ready state, then the button is toggled up.

Changing to Not Ready State

This procedure describes how to indicate that you are not ready to receive inbound work items.

To indicate that you are not ready to receive inbound work items

- Do one of the following:
  - Click Change Ready State to indicate that you are not ready to receive any inbound work items of all channel types for which you are eligible.
  - Click the arrow next to Change Ready State, then choose one or more options from the displayed menu to indicate that you are not ready to receive work items for the applicable channel types.



Note: If you click the Change Ready State button to set the Not Ready State for all channel types, but the button does not display as toggled-down (depressed), then this might be due to a configuration error or some other issue for one or more channels. Report this issue to your supervisor. You can still choose the Not Ready State for individual channels, as described in the second bullet item.

Changing to Ready State

This procedure describes how to indicate that you are ready to receive inbound work items.

To indicate that you are ready to receive inbound work items

- Do one of the following:
  - Click Change Ready State to indicate that you are ready to receive any inbound work items of all channel types for which you are eligible.
  - Click the arrow next to Change Ready State, then choose one or more options from the displayed menu to indicate that you are again ready to receive work items of the applicable channel types.

18 Email

Email

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

- *Replying to Incoming Messages*
- *Resending Outgoing Messages*
- *Resending Outgoing Messages That have Failed*
- *Using Templates in Outgoing Messages*
- *Saving Drafts of Outgoing Messages*
- *Retrieving Drafts of Outgoing Messages*
- *Saving Messages as a Template*
- *Specifying Preferences for Outbound Communications*
- *Sending Email Messages Using an External Email Client*

Replying to Incoming Messages

After you send or cancel an outgoing message, the outgoing message form appears or the Communications List view appears as follows:

- If you select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the outgoing message form continues to appear. You must navigate to the Communications List view to see a record of the sent message.
- If you do not select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the Communications List view appears.

Complete the following procedure to reply to an incoming message.

To reply to an incoming message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Inbox in the Saved Queries field of the toolbar.
3. In the list of email messages, select the incoming message to which you want to reply.
4. To see more details about this message, do the following:
    - Click the Body view tab to review the main text of the incoming message.
    - Click the Attachments view tab, and then click the Name field in the list of attachments to review the content of an attachment for the incoming message.

      The original message also appears in the list of attachments.
    - (Optional) Click the More Info view tab to review information about the header, customer, attributes, and transmission of the incoming message.

- (Optional) Click the History view tab to review any other messages that have the same email thread ID as the incoming message.
- (Optional) Drill down on the Last Name field for the message to review information about the contact for the message.

5. Navigate to the outgoing message form:
   - Click Reply to respond to only the individual who sent the message.
   - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
   - Click Forward to respond to the individuals whom you select in the outgoing message form.

   The form for the incoming message appears on-screen. To show or hide the body of the incoming message, click the show more or show less button in corner of the incoming message form.

   The form for your outgoing message appears after the form for the incoming message.
6. (Optional) Link additional data to the email thread for the outgoing message.
   a. Click the select button in the SR # (number), Opportunity, Contact, or Account field of the outgoing message form.
   b. Select the appropriate record, and click OK.

   If the SR # (number), Opportunity, Contact, or Account field already contains a value, then click the preview button to view more details about that value.
7. Enter text for the outgoing message in the area of the message body that precedes the Thread ID reference.

   At the start or end of the outgoing message form, click Delete to delete the outgoing message. To expedite text entry, use templates. For more information, see *Using Templates in Outgoing Messages*.
8. (Optional) At the start of end of the outgoing message form, click Check Spelling to verify the spelling in the outgoing message.
9. (Optional) In the list of Outgoing Attachments that appears after the outgoing message form, insert the supporting documents in your outgoing message:
   - To add an attachment, click Attachment (the paperclip icon), navigate to the attachment, and select it.
   - To add literature, click Add Literature (the sheet of paper icon), select the document from the list, and click Add.
10. At the start or end of the outgoing message form, click Send after you finish composing the outgoing message.

    The outgoing message is sent.
11. (Optional) To view the record for the sent message, select Sent Items in the Saved Queries field of the toolbar.

Resending Outgoing Messages

When Communications Outbound Manager fails to send an outgoing message, the Status field of the outgoing message changes to Canceled. You can resend these canceled messages.

To resend an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Canceled Items in the Saved Queries field of the toolbar.

3. In the list of email messages, select the outgoing message that you want to resend.
4. Click Re-Send.

Resending Outgoing Messages That have Failed

When Communications Manager fails to send an outgoing message to multiple recipients in which some recipients have incorrect email addresses, the Status field of the outgoing message changes to Partial. You can resend these messages to those recipients who failed on the first attempt.

To resend an outgoing message that failed because of incorrect email address

1. Navigate to the Communications screen, then the Communications List view.
2. In the list of email messages, select the outgoing message with a Partial status that you want to resend.
3. Click Recipients and look for a Failed status.
4. Click Resume to navigate to the outgoing message form.
5. Correct the email address.
6. Click Send.

Using Templates in Outgoing Messages

To expedite entry of greeting, body, and closing text in outgoing messages, agents can use templates. Before using a template for body text, you must create the template, associate the template with a category, and include the category in a catalog.

To use a template, you insert the template text into the outgoing message. Then you can change that text, if necessary. You can also delete that text, and insert other template text. You insert text for a solution into an outgoing message in the same way that you insert any other template text.

To use a template in an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. In the list of email messages, select the message for which you want to use a template.
3. Navigate to the outgoing message form:
    - If the message that you select does not have a status of Draft, perform one of the following actions:
        - Click Reply to respond to only the individual who sent the message.
        - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
        - Click Forward to respond to the individuals whom you select in the outgoing message form.
    - If the message that you select has a status of Draft, then click Resume.

      The form for the incoming message appears on-screen. To show or hide the body of the incoming message, click the show more or show less button in the corner of the incoming message form.

The form for your outgoing message appears after the form for the incoming message.

4. To insert template text for the greeting of the message, then select the template in the Greeting field of the outgoing message form.

   The greeting template text appears at the beginning of the outgoing message.

   If you select another greeting template, then the template text replaces the greeting text of the outgoing message. If you delete the greeting template text and want to reinsert the same text, then you must clear the Greeting field, and then reselect the template in the Greeting field.
5. To insert template text for the body of the message:
   a. In the Categories field of the outgoing message form, select the category that applies to the body template.
   b. Select the template in the Body field of the outgoing message form.

      The body template text appears after the text for the greeting template. If you enter greeting or body text before you insert the template text for the body of the message, then the body template text appears after the text that you enter.
   c. If necessary, insert other body template text.

      The text for each selected template appears after the text for the previously selected template.

      If you delete the body template text and want to reinsert the same text, then you must reselect the category that applies to the template, and then reselect the template in the Body field.
6. To insert template text for the closing of the message, then select the template in the Closing field of the outgoing message form

   The closing template text appears after the outgoing message, which precedes the Thread ID reference.

   If you select another closing template, then the template text replaces the closing text of the outgoing message. If you delete the closing template text and want to reinsert the same text, then you must clear the Closing field, and then reselect the template in the Closing field.

Saving Drafts of Outgoing Messages

When composing an outgoing message, agents might not have the time or information that they need to complete the message and then send it. They can save this incomplete message, and then later retrieve this draft to complete the message before sending it. For more information, see *Retrieving Drafts of Outgoing Messages*.

You can save a draft of sent messages and of outgoing messages. After you save a draft of an outgoing message:

- If you select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the outgoing message form continues to appear. You must navigate to the Communications List view to see a record of the draft of the outgoing message.
- If you do not select the Remain on Same View After Send (Cancel) field in the Outbound Communications view of the User Preferences screen, then the Communications List view appears.

To save a draft of an outgoing message

1. Navigate to the Communications screen, then the Communications List view.

2. Select Inbox or Sent Items in the Saved Queries field of the toolbar.
3. In the list of email messages, select the message that you want to save as a draft.
4. Navigate to the outgoing message form:
   - Click Reply to respond to only the individual who sent the message.
   - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
   - Click Forward to respond to the individuals whom you select in the outgoing message form.

   The form for the incoming message appears on-screen. To show or hide the body of the incoming message, click the show more or show less button in the corner of the incoming message form.

   The form for your outgoing message appears after the form for the incoming message.
5. Enter text for the outgoing message in the area of the message body that precedes the Thread ID reference.
   At the start or end of the outgoing message form, click Delete to delete the outgoing message. To expedite text entry, use templates. For more information, see *Using Templates in Outgoing Messages*.
6. On the outgoing message form, click Save As Draft.
7. To make further changes to the draft, then click Resume, enter the changes, and click Save As Draft again.
   The message is saved as a draft.

   Note: If you do not click Save As Draft, then the message is still saved as a draft when you navigate to another screen or view in Email Response.
8. (Optional) To view the record for the draft message, select Drafts in the Saved Queries field of the toolbar.

Retrieving Drafts of Outgoing Messages

When composing an outgoing message, agents might not have the time or information that they need to complete the message and then send it. They can save this incomplete message, and then later retrieve this draft to complete the message before sending it. For more information, see *Saving Drafts of Outgoing Messages*.

To retrieve a draft of an outgoing message

1. Navigate to the Communications screen, then the Communications List view.
2. Select Drafts in the Saved Queries field of the toolbar.
3. In the list of email messages, select the draft message.
4. Click Resume to navigate to the outgoing message form for the draft.
   The form for the incoming message appears on-screen. To show or hide the body of the incoming message, click the show more or show less button in corner of the incoming message form.

   The form for your outgoing message appears after the form for the incoming message, and this form contains the draft text.
5. If necessary, change the content in the draft message.

   Note: To rescind your changed content, then you must delete that content. Do not click Delete to rescind your changed content. Click Delete only to delete the draft message.
6. To save the draft message, click Save As Draft on outgoing message form.

7. To make further changes to the draft, then click Resume, enter the changes, and click Save As Draft again.

   The message is saved as a draft.

   > **Note:** If you do not click Save As Draft, then the message is still saved as a draft when you navigate to another screen or view in Email Response.

8. To send the draft message, click Send at the start or end of the outgoing message form.

   The outgoing message is sent.
9. (Optional) To view the record for the sent message, select Sent Items in the Saved Queries field of the toolbar.

Saving Messages as a Template

An agent might decide that the content of a message is likely to apply to replies for future incoming messages. The agent can save the message as a simple template, so that the agent or other agents can use that simple template to expedite text entry in future outgoing messages.

To save a message as a template

1. Navigate to the Communications screen, then the Communications List view.
2. Select Inbox, Sent Items, or Drafts in the Saved Queries field of the toolbar.
3. In the list of email messages, select the message for which you want to save a message template.
4. Navigate to the outgoing message form:
   - If the message that you select does not have a status of Draft, then perform one of the following actions:
     - Click Reply to respond to only the individual who sent the message.
     - Click Reply to All to respond to the individual who sent the message and to the individuals in the Cc: field of the message.
     - Click Forward to respond to the individuals whom you select in the outgoing message form.
   - If the message that you select has a status of Draft, then click Resume.

     The form for the incoming message appears on-screen. To show or hide the body of the incoming message, click the show more or show less button in the corner of the incoming message form.

     The form for your outgoing message appears after the form for the incoming message.
5. On the outgoing message form, click Save as Template.

   The Templates dialog box appears.
6. Change the fields and message text in the Templates dialog box as necessary, and click OK.

   The template is created, and the form for your outgoing message appears again after the form for the incoming message.
7. To view the record for the template, navigate to the Communications screen, then the My Templates view.
8. Change the Status field of the template record from Draft to Active to make the template available to other users.

Specifying Preferences for Outbound Communications

This topic describes how users can specify outbound communications preferences.

To specify preferences for outbound communications

1. From the application-level menu, choose Tools, then User Preferences.
2. From the link bar, choose Outbound Communications.
3. Specify the preferences.
4. As necessary for the particular setting, log out of the application, and log in again.
   The descriptions for each user preference setting indicate whether this step is required.

Sending Email Messages Using an External Email Client

This topic describes how to use the Send Email command when running Email Response in your Web application, and you want to send an email using the default email client as defined by your operating system. For more information about selecting an external email client, see *Specifying Preferences for Outbound Communications*.

The invocation of the default email client is done with a mailto URL. Mailto URLs have the following characteristics:

- They do not provide a mechanism to pass HTML to the email client. Only plain text email templates work with the defined External Email Client.
- They do not allow for attachments to be passed to the email client. If attachments are required, then the user must manually attach them after the email client opens.

To send email messages using an External Email Client

1. Select a record or set of records in the application.

   Note: Users must generally select a single record before invoking Send Email when using templates for which field substitution is performed. If they select multiple records, then selected generic recipients are drawn from all the selected records. However, field substitution applies only to the first selected record, and a single email message is sent to all recipients.

2. Perform one of the following steps:
   a. From the application-level menu, choose File, then Send Email.
   b. Press F9.
3. In the Recipient or Template dialog box, perform the following steps:
   a. If the Recipient field is shown, then specify the recipient or specify no recipient yet.

      Note: Whether the Recipient field appears depends on the kind of data that currently has the focus when you choose the Send Email command.

      If the current record is a person, such as a contact or employee, then the Recipient field does not appear.

If the current record is some other entity, such as a service request or opportunity, then the Recipient field appears if recipients are configured for that object. The type of recipients varies by object, such as the contacts associated with the current service request or the employees associated with an opportunity.

b. If necessary, click Change Language or Locale to change the language or locale, as necessary.

   Setting the language and locale changes the list of available templates to those associated with the language and locale you specify.

c. From the Message Template field, choose the name of a communications template to insert into the message body.

   The listed templates are subject to filtering that is based on several factors, including channel, language, locale, and whether the template is HTML or plain text.

   > **Note:** If the current record type (business component) has a default template associated with it, then you do not need to specify a template. If you specify a template, then its text is appended to the default template text in the email message. Consult your administrator, or verify the software behavior to see whether a default template is configured.

d. In the Recipient or Template dialog box, click OK to continue to the email message window for the external email client.

4. In the external email client, complete the following steps:

   a. For the To, Cc, or Bcc fields, perform one or more of the following steps:

      Verify any recipients that were automatically inserted in previous steps.

      Specify any additional recipient email addresses from the email directories available through your email client program.

   b. Optionally, verify or enter text for the subject line. Text might be automatically inserted into the subject line when you select a template.
   c. Optionally, enter and format free-form text to modify or add to the template text.
   d. Optionally, specify operating system files as attachments to the email message.
   e. Optionally, check the spelling for your message, according to the support of your email client program.
   f. Send the message, or cancel the message if you decide not to send the email message.

      > **Note:** After the mailto URL is invoked and the external mail client opens, there is no feedback to the application regarding whether the email was modified, sent, or canceled. The Email Response does not update the activity record in the Siebel database with user changes.

19 Chat

Chat

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

- *Logging in to Chat*
- *Accepting an Incoming Chat Manually*
- *Opening an Automatically Accepted Incoming Chat*
- *Responding to an Incoming Chat*
- *Showing and Hiding the Chat Pane*
- *Switching Between Chat Sessions*
- *Transferring a Chat to a Workgroup*
- *Transferring a Chat to Another Agent*
- *Handling Transferred Chat Interactions*
- *Releasing a Chat*
- *Closing Chat Sessions*
- *Showing and Hiding the Chat Dashboard*
- *Changing Agent Status*

Logging in to Chat

After you have successfully installed Chat, you can launch it from your Call Center application. To log in to chat, complete the steps in the following procedure.

To log in to chat

1. Log in to your application.
2. Click the Log in button on the communications toolbar.
   You are now ready to do the following:
   - Receive, accept, and respond to inbound chat requests.
   - Transfer and release chat interactions.
   - Change your status from ready to not ready (and conversely).

   You perform all of these actions using the communications toolbar.
   The communications toolbar is defined and configured in Siebel Tools, like other toolbars in Siebel applications. For more information about configuring the communications toolbar and about the functions available on the communications toolbar, see *Siebel CTI Administration Guide* .

Accepting an Incoming Chat Manually

Use the following procedure to manually accept an incoming chat. You must manually accept incoming chats when chat auto answer is disabled.

To accept an incoming chat manually

1. Click the flashing Accept Work Item button on the communications toolbar.
2. A chat pane opens in an action pane of your Call Center application. The chat dashboard is prepopulated with the information provided by the user on the chat request form. The customer dashboard also opens, showing customer information.
3. Respond to the incoming chat.

Opening an Automatically Accepted Incoming Chat

Use the following procedure to open an incoming chat that has been automatically accepted. This happens when chat auto answer is enabled. This procedure assumes that there are other active chat sessions or that the agent is already working on an existing chat.



Note: If there are no other active chat sessions or you are not working on an existing chat, then there is no need to do anything to open the incoming chat as the chat pane opens up automatically.

To open an automatically accepted incoming chat

1. Click the flashing chat tab to open the chat session.

   The chat tab stops flashing and a chat pane opens in an action pane of your Call Center application. The chat dashboard is prepopulated with the information provided by the user on the chat request form. The customer dashboard also opens, showing customer information.
2. Respond to the incoming chat.

Responding to an Incoming Chat

When you accept an incoming chat, you can respond to the chat in several different ways as described in the following procedure.

To respond to an incoming chat

1. Accept the incoming chat as described in *Accepting an Incoming Chat Manually*.
2. In the message input area of the chat pane, respond to the incoming chat using one or a combination of the following:

a. Send a message to the customer as described in *Sending a Message*.
b. Push a Web URL to the customer as described in *Pushing a Web URL*.
c. Share information with the customer as described in *Sharing Information Using Smart Share*.

3. Depending on the information provided by the customer on the chat request form (contact ID, service request ID), create a new service request if configured to do so, where no service request already exists.

   For anonymous chats, a service request is always created and also a corresponding activity. An activity is created either under a Service Request or a Contact record.
4. Release the chat as described in *Releasing a Chat*.

Sending a Message

There is typically a global list of predefined message responses at your disposal to send to customers when handling chat interactions. In responding to chat requests, you can type a message response or send a predefined message response, as described in the following procedure.

To send a message

1. In the message input area of the chat pane, type in the message response, and then click Send.
2. If required, send a message using FUT (Frequently Used Text) matching as follows:

   a. On the text button bar, click the Toggle FUT button to enable FUT matching.

      After FUT matching is enabled, matching is based on input text by default but you can change this to filter on a different match field as shown in step 3.

      > **Note:** FUT matching is disabled by default. The keyboard shortcut to enable or disable FUT matching is Ctrl+Shift+F.

   b. Type in your message.

      While typing in your message, any matches found appear in a drop-down list and any matched words show in bold.
   c. Click a suggested match to select and use that option.
3. If required, filter FUT matching on a different match field as follows:

   a. On the text button bar, click the Change FUT Match Field button and then select one of the following:
      - **Name.** Select to filter FUT matching on FUT template name.
      - **Type.** Select to filter FUT matching on FUT template type (Greeting, body, or Closing).
      - **Subject.** Select to filter FUT matching on subject.
      - **Text.** Select to filter FUT matching on FUT template text.

      > **Note:** FUT matching is based on input text by default. The keyboard shortcut to change the FUT match field is Ctrl+Shift+U.

   b. Type in your message.

      While typing in your message, any matches found appear directly in a drop-down list and any matched words show in bold.
   c. Click a suggested match to select and use that option.

Pushing a Web URL

There is typically a global list of Uniform Resource Locators (URLs) at your disposal to share with customers using push URL technology. When you share a URL with a customer, it is automatically displayed in the customer's browser; the customer does not have to manually copy and paste the URL in to a browser window.

In responding to an incoming chat, you can type the URL address of a page that you want to share or push a predefined URL, as described in the following procedure. All URLs that you send to a customer appear in the transcript area of the chat pane.

To push a Web URL

1. In the URL area of the chat pane, enter the URL address of the page you want to send, then click the Push URL button.
2. If required, push a predefined Web URL as follows:
    a. On the URL button bar, click the URL Library button.
    b. Pick a URL option from the list that displays, then click OK..

Note: Pushed URLs can either appear in a frame within the customer's chat window or in a completely new browser window depending on configuration. Where a new browser window is launched, subsequent URL pushes simply refresh the same window.

Sharing Information Using Smart Share

Using the Smart Share button in the chat pane, you can share highlighted text, service request details, and solution details with customers.

To share information using Smart Share

- On the text button bar of the chat pane, click the Smart Share button to do one of the following:
    - Copy the selected text in an attribute field from the currently active view into the message input area.
    - Paste the service request number and summary of a selected Service Request into the message input area; that is, where a single service request record is selected from either a list or form view.
    - Paste the solution ID and description of a selected Solution into the message input area; that is, where a single solutions record is selected from either a list or form view.

Showing and Hiding the Chat Pane

Use the following procedure to show (open) and hide (close) the chat pane. Closing the chat pane does not destroy any active chat sessions.

To show and hide the chat pane

- Click Chat on the communications toolbar of your application to open (show) and close (hide) the chat pane, as required.

Note: You can also click Close in the corner of the chat pane to close the chat pane, see *Closing Chat Sessions*.

Switching Between Chat Sessions

By default, all open chat sessions are automatically put on hold except for the chat session that is currently active. When an agent moves away from the currently active chat session by clicking another chat tab, the previously active chat is automatically placed on hold and the previously suspended chat is resumed.

Where all chat sessions are on hold and an agent manually accepts a new incoming chat, then that new chat becomes the active chat session and all other chat sessions remain on hold.

To switch between chat sessions

1. In the chat pane, click the chat tab belonging to the chat session that you want to move to.
2. Resume work on the active chat session.

Transferring a Chat to a Workgroup

Complete the steps in the following procedure to transfer a chat to a workgroup.

To transfer a chat to a workgroup

1. Select the chat that you want to transfer:

   In the chat interface, click the tab of the chat interaction that you want to transfer.
2. Click the Blind Transfer Work Item button on the communications toolbar.
3. Select a workgroup on the Blind Transfer Work Item list that opens, then click OK.

   The chat is transferred to the selected workgroup. The chat transcript includes all previous conversations and interactions that the previous agent had with the customer.

   The Blind Transfer Work Item list shows only the available chat workgroups. It does not show any available voice (or CTI) workgroups.

Note: Any messages that the customer sends while the agent is transferring a chat are lost; that is, they are not captured in the chat window or transcript.

Transferring a Chat to Another Agent

Complete the steps in the following procedure to transfer a chat to another agent.

To transfer a chat to another agent

1. Select the chat that you want to transfer:

   In the chat interface, click the tab of the chat interaction that you want to transfer.
2. Click the Transfer to Agent button on the communications toolbar.
3. Select an agent that has a status of Available on the Transfer to Agent list that opens, then click OK.

   The chat is transferred to the selected agent. The chat transcript includes all previous conversations and interactions that the previous agent had with the customer.

   You cannot transfer a chat to an agent that has a status of Busy, On Break, or Logged Out.



Note: Any messages that the customer sends while the agent is transferring a chat are lost; that is, they are not captured in the chat window or transcript.

Handling Transferred Chat Interactions

Complete the steps in the following procedure to handle a transferred chat.

To handle a transferred chat

1. Upon receipt of a transferred chat interaction, do one of the following as required:
   - Click the flashing chat tab to open the chat session (when chat auto answer is enabled).
   - Click the Accept Work Item button on the communications toolbar to open the chat session (when chat auto answer is disabled).
2. Review the chat transcript (if there is one) in the transcript area of the chat pane.
3. Respond to the transferred chat.

Releasing a Chat

Releasing a chat session means that you are ending the chat session. Agents use the communications toolbar to release a chat. Customers click the Terminate (or similar) button in their browser window to release a chat.

When you (or a customer) release a chat session, a follow-up email is sent to the customer with a transcript of the chat session attached provided the system preference Chat: Auto Email Mode is set, and that outbound email

communications and the email profile are set up in your application. In the case where a chat is transferred several times, the follow-up email is sent only upon final release of the chat session.

For information about email profile set up in Siebel Call Center, see *Siebel Email Administration Guide* . For information about outbound email communications set up in Siebel Call Center, see *Siebel Chat Guide* and *Siebel Email Administration Guide* .

Closing Chat Sessions

Typically, when you (or a customer) release a chat session, all action buttons within the chat pane are disabled but you can still read a transcript of the chat session in the chat transcript area. To close the chat session, you must do one of the following:

- Where only one chat session is open, you must close the chat pane by clicking the Close button in the corner of the chat pane.
- Where multiple chat sessions are open and the current chat session is released, you must either close the current chat session or switch to another chat tab to automatically close the current chat session.
- Where multiple chat sessions are open and a chat session in the background is released, then the released chat session is automatically closed.

To close a chat session

- Click the Close (X) button located in the corner of the chat pane.

  When you close or end a chat session, the chat transcript is attached to the activity and also to the email that is sent to the customer after the chat session.

Showing and Hiding the Chat Dashboard

Use the following procedure to hide the chat dashboard in the chat pane.

To hide the chat dashboard

- Click the Hide Dashboard button located in header bar of the chat pane.

After you have minimized the chat dashboard, use the following procedure to show the chat dashboard again.

To show the chat dashboard

- Click the Show Dashboard button located in the header bar of the chat pane.

Changing Agent Status

When an agent logs into chat, the agent's status is automatically set to State: ready as indicated by the status button on the communications toolbar. If agents want to change their status from State: ready (available) to State: not ready (unavailable), then they must click the status button on the communications toolbar.

To change agent status

1. Log in to your application.
2. Click the Log in button on the communications toolbar to log in to chat.

   Notice that your status, as indicated by the status button on the communication toolbar, is set to State: ready by default.
3. Click the status button on the toolbar to change your status from State: ready to State: not ready (and conversely).

20 Notifications

Notifications

This chapter describes how to administer and review notifications for your application. It includes the following topics:

- *About Notifications*
- *About Web Notifications*
- *Scenario for Administering Notifications*
- *Process of Administering Notifications*
- *Enabling and Disabling Notifications*
- *Enabling or Disabling Notifications in Mobile and Developer Web Clients*
- *Creating a Notification*
- *Updating a Notification*
- *About Automatically Updating Notification Text*
- *Configuring Notifications Caching*
- *Reviewing Notifications*

About Notifications

Notifications provides a way for administrators and other users to send important information directly to the screens of users. Typically, this information is time-critical, such as a due date, or it is updated frequently, such as the status of a call queue.

Messages appear in notification panes that users access by clicking Notification (the exclamation mark icon) on the application toolbar. They have severity levels (indicated by color) and activation and expiration dates.

You create notifications in the Message Broadcasts view of the Administration - Communications screen. Notifications can be created automatically from Siebel Business Process Designer or remotely from a third-party application through Siebel EAI.

Note: Notifications are available for employee applications, but not for customer or partner applications.

Notification Message Order

Messages in the notification pane appear in a set order. Unread messages appear first in the pane and are sorted by message date with later messages appearing before earlier messages. Read messages appear after the unread messages and are also sorted by message date with later messages appearing before earlier messages.

Notification messages are retrieved from the Message table through the Siebel Application Server and they are sent to the notification pane of the targeted Web client sessions.

Disabling Notification Messages

When the administrator sets a component parameter that allows users to enable or disable notification messages, users can disable the Notification button and notification panes. The administrator can change this component parameter to override this user setting for notification messages.

Notification Caching Versus Directly Polling the Siebel Database

The Siebel application obtains the display messages by using the following methods:

- The default behavior is read the messages from the Siebel database each time the notification pane is refreshed. This method can adversely affect performance if the panes are set to refresh frequently.
- Notification caching stores messages in each Siebel Application Object Manager. The messages are then sent through the Service Request Broker (SRBroker).

About Web Notifications

Your application supports Web notifications for incoming calls and chats. The Web notifications feature is based on the standard Web Notifications API. Siebel integrates the Web Notifications API (http://www.w3.org/TR/notifications/) with Siebel CTI and Siebel Chat so that when any of the following happens, an alert or pop-up window appears notifying agents about incoming calls and chats so that customer calls or chats will not be missed:

- Agents navigate away from the main application browser window.
- The application browser window is minimized or hidden behind another application window.

Clicking inside the Web notification pop-up window brings the application browser window to the front. There is a Bring Siebel to Front user preference which you can set to one of the following options to control when to display Web notifications for incoming calls and chats:

- On All Incoming Work Items
- On Matching Events
- Off

For more information about the Bring to Front user preference, see *Siebel CTI Administration Guide* and Doc ID 216960.1 on My Oracle Support.

Note: This topic is valid for Google Chrome and Mozilla Firefox browsers since they both provide native support for the Web Notifications API. Microsoft IE browsers, however, do not support the Web Notifications API out-of-the-box. The Desktop Integration Siebel Agent (DISA) is provided to support Web notifications functionality in IE browsers. For more information about DISA, see *Desktop Integration Siebel Agent Guide* .

Scenario for Administering Notifications

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

The contact center administrator wants to inform customer-care representatives of the current total number of outbound calls relative to their day's goal. In addition, the administrator wants the inform customer-care representatives of the current customer service levels and whether customers are waiting for service.

After working with the telecommunications and application teams to define the appropriate real-time contact center statistics for his customer-care representatives and contact center, the contact center administrator creates notifications, using statistics from a variety of sources and third party solutions. The real-time data feed into the notifications tables is accomplished through Siebel EAI after the appropriate statistics and their sources are identified. The customer-care representatives then receive their individual and group statistics on their notification pane in real time.

In addition to providing his customer-care representatives with this real-time status information, the contact center administrator also wants to send informative messages to individuals and teams in real time. Throughout the shifts and work day, he sends these messages to individuals and teams using the Message Broadcasts view within the Siebel application. The contact center administrator can send a message to an individual employee, a set of employees with the same responsibility, a division of employees, or to all employees.

The customer-care representatives service customers using multiple communication channels with the Siebel application. The customer-care representative receives contact center statistics calculated for an individual, a group, or in summary on the notification pane within the Siebel application. This real-time information updates the customer-care representatives about whether they and the call center are meeting their service objectives.

Process of Administering Notifications

To administer notifications, perform the following tasks:

1. *Enabling and Disabling Notifications*
2. (Optional) *Enabling or Disabling Notifications in Mobile and Developer Web Clients*
3. *Creating a Notification*
4. *Updating a Notification*
5. *About Automatically Updating Notification Text*
6. *Configuring Notifications Caching*

Enabling and Disabling Notifications

By default, notifications are enabled. As an administrator, you can enable or disable notifications. You can set notifications to operate in any of the following modes:

- Always enabled
- Always disabled

- User enabled (default)

This task is a step in *Process of Administering Notifications*.

To enable or disable notifications for an application

1. Navigate to the Administration - Server Configuration screen, then the Enterprises view.
2. From the Enterprise Servers list, select the enterprise server that runs the application with the notification settings you want to modify.
3. Navigate to the Component Definitions view, and select a component with a Component Type value of Application Object Manager.
4. In the Component Parameters list, select the Application Message Bar Flag parameter and enter the appropriate value in the Value field, which can be one of the following:



Note: For details on how to configure the server component, Siebel Application Object Manager or parameters, see *Siebel System Administration Guide* .

Value	Description
TRUE	Specify this value if you want to always enable notifications. Note the following about a value of TRUE: o Users cannot disable notifications. o For Siebel Web client deployments, the Siebel Application Server relays messages to users. For Mobile Web client users, messages are synchronized. o You can use the Application Message Bar Update parameter to specify the refresh rate for the notification pane. Modify the Value field of the Application Message Bar Update parameter. The default value is 120 seconds. o If the update interval is less than the SessionTimeout set in the CFG file of the application, then sessions never time out.
FALSE	Specify this value if you want to always disable notifications. Note the following about a value of FALSE: o The Notification button and notification panes do not appear on the screens of users o For Siebel Web client deployments, the Siebel Application Server does not relay messages to users. For Mobile Web client users, messages are not synchronized.
User Enabled	Specify this value if you want users to enable or disable notifications in their user preferences. Note the following about a value of User Enabled: o The update interval is a user preference o If a Web client user disables notifications, then the Siebel Application Server does not relay messages to the user. If a Mobile Web client user disables notifications, then messages are not synchronized. o If the update interval is less than the SessionTimeout set in the CFG file of the application, then sessions never time out.

Enabling or Disabling Notifications in Mobile and Developer Web Clients

You can enable or disable notifications in Siebel Mobile and Developer Web clients. This task is an optional step in *Process of Administering Notifications*.

To enable or disable notifications on Mobile and Developer Web clients

1. Open the CFG file for your Siebel application using a text editor.
2. Locate and go to the ShowMessageBar parameter in the CFG file.

   For example: ShowMessageBar=True.
3. Set the parameter value to TRUE, FALSE, or User Enabled as required.

   For a description of each parameter value, see Step 4 in *Enabling and Disabling Notifications*.
4. If you set the ShowMessageBar parameter to True, then specify the refresh rate for the notification pane by adding the following line to the CFG file:

   ```
   MessageBarUpdateInterval=seconds
   ```

   Where seconds is the interval in seconds between refreshes to the notification pane. The default value is 120 seconds.
5. Save and close the CFG file.

Creating a Notification

When you create a notification, all connected users you specify receive the message immediately on the date and time you specify for message activation. Mobile users, such as field representatives, receive the activated messages when they synchronize.

Note: To send a notification, you must have responsibilities that include access to the Message Broadcasts view.

This task is a step in *Process of Administering Notifications*.

To create a notification

1. Navigate to the Administration - Communications screen, then the Message Broadcasts view.
2. In the Message Broadcasts list, create a new record, and complete the following fields as required:

Field	Description
Severity	Select the severity level to indicate the importance and appearance of the message. Each severity level is associated with a color. The severity level that you select determines the color of the text in the message. If you select a severity of Urgent with Alert, then the user sees a blinking Notification button, and clicks the blinking button to view the message.
Abstract	Type a brief description of the message. When users click the Notification button to access messages, this text appears in the notification pane.
Message	Type the text you want to include in the message. This field accepts up to 2,000 characters. This text appears in the notification pane.
Recipient Position	Select the positions associated with the users to whom to send the message. You can use this field in combination with the Recipient Division field. An employee name appears in the Recipients dialog box if the employee has a defined position and is marked active for that position. If multiple employees occupy the same position, then the message is sent to all of them, although you see only the active employee on the list. Employees with multiple positions see messages sent to any of their positions, regardless of the position associated with their login ID.
Recipient Division	Select the divisions associated with the users to whom to send the message. You can use this field in combination with the Recipient Position field.
All	Select this check box to send the message to all users.
Activation Date/Time	Select the date and time at which you want to start sending the message. If the Activation field is blank, then the message is sent immediately. However, notifications are controlled by the application message interval and login. The date and time are taken from the Siebel Server (not from the computer where the client browser runs). Make sure that the date and time are set correctly on the server.
Expiration Date/Time	Select the date and time at which you want to stop sending the message. If the Expiration field is blank, then the message is sent continually.

Field	Description
	The date and time are taken from the Siebel Server (not from the computer where the client browser runs). Make sure that the date and time are set correctly on the server.
Broadcast	Select this check box to display the message in the notification pane. Clear the check box to hide (not display) the message in the notification pane.
Briefing Bulletin	Select this check box to distribute the message as a bulletin on the My Briefing page. For more information, see *Siebel Briefings Administration Guide* .
Allow Dismiss	Select this check box to allow users to dismiss (or delete) the message in the notification pane. When you select this check box, Dismiss appears next to the message in the notification pane, and users click Dismiss to dismiss the message.
Recipient Users	Select the users to whom to send the message. If the values that you select in the Recipient Position field and the Recipient Division field are not associated with all of the users to whom you want to send the message, then select the remaining users in this field.

Updating a Notification

Sometimes after a message is sent to users, you might want to change the message text. In this scenario, you want users who have already read or dismissed (deleted) the message to see your changed version of the message. Complete the procedure in this topic to convert a message that users have already read or dismissed to a message that users have not read or dismissed. Users can then access the message again to see the changed version of the message.

This task is a step in *Process of Administering Notifications*.

To update a notification

1. Log in to your application as administrator.
2. Navigate to the Administration - Communications screen, then the Message Broadcasts view
3. In the Message Broadcasts list, select the message you want to update.
4. Complete the appropriate changes to the message.
5. Click Set as Unread.
   After you update an existing or create a new notification message, the updated or new message is sent directly to application screens and the counter beside the Notification button on the menu toolbar increases to indicate that a new message has arrived. If the new message waiting to be read has an Urgent with Alert severity, then the Notification button also blinks on the menu toolbar.
   Administrators can modify the code internally for notification messages on either the client or server-side using the following APIs:

- **AddNotification.** Creates a notification and returns the Row_Id of the notification.
- **DeleteNotification.** Deletes a notification using the Row_Id.
- **UpdateNotification.** Updates a notification using the Row_Id.
- **ReadNotification.** Returns the notification details using the Row_Id.

For more information about these APIs, see *Configuring Siebel Open UI* .

About Automatically Updating Notification Text

As an administrator, you can customize notifications to automatically update message text that changes frequently. For example, a call center's queue statistics frequently change. Every few minutes, an administrator has to update the statistics to make sure agents have the most accurate information. This manual approach is very time consuming and inefficient when dealing with frequently changing data.

You can use Siebel EAI to automatically update notification text. Your CTI middleware or ACD switch can provide the data for the Siebel application to distribute.

The Broadcast Message business component manages the messages. The following table describes the fields of this business component. These field names are necessary for developing the integration object.

This task is a step in *Process of Administering Notifications*.

Field	Description
Abstract	A short summary for identifying the purpose of a message, such as Calls In Queue.
Activation Date/Time	The beginning of the notification.
All	The designation to send the message to all employees with positions defined.
Body	The text of the message.
Division	The designation to set recipients using division.
Division Id	The internal identification value for Division.
Expiration Date/Time	The end of the notification.
Position	The designation to set recipients using position.
Position Id	The internal identification value for Position.
Recipient	The designation to set recipients using employee.

Field	Description
Recipient Id	The internal identification value for Recipient.
Type	The severity of the message as defined in the type BRDCST_MSG_TYPE in the List of Values.
Via Broadcasting	The designation to send the message using notifications.
Via Interactive	The designation to send the message using Siebel eBriefings.

Sample Notifications Script

The notification script can be created through a button, an Excel macro, or another VB application. Because it is a script and not an application, it does not need the VB Set command. All the commands are standard to VB coding.

This script is designed to update a message without an expiration date, not to create a new message every time. For more information about how to get or create a Siebel Application Object, see *Configuring Siebel Business Applications* .

Note: The code in this example updates single value fields. For information about how to update multi-value fields, see *Configuring Siebel Business Applications* .

```
'Get "Broadcast Message" BusComp
 Set BusObj = SiebelApplication.GetBusObject("Broadcast Message", errCode)
 Set BusComp = BusObj.GetBusComp("Broadcast Message", errCode)
'Find "Calls Waiting" message
 BusComp.SetSearchSpec "Abstract", "Calls In Queue", errCode
 BusComp.ExecuteQuery 0, errCode
 If BusComp.FirstRecord(errCode) <> True Then
'We need to create a new message
 BusComp.NewRecord 0, errCode
 BusComp.SetFieldValue "Abstract", "Calls In Queue", errCode
`Prepare message using middleware API info.
 End If
 Set Msg = "[N]Calls Waiting: [U]10"
'Update the record
 BusComp.SetFieldValue "Body", Msg, errCode
 BusComp.SetFieldValue "All", "Y", errCode
Write the record
 BusComp.WriteRecord errCode
```

In addition to writing a script, you can use Siebel Business Process Designer to create or update a message. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Configuring Notifications Caching

The following task describes how to configure your Siebel application to take advantage of notifications caching. For information about activating the Check New Broadcast Message workflow policy, see *Siebel Business Process Framework: Workflow Guide* .

Note: Notifications administration is not supported on Mobile Web clients when notifications caching is enabled. Make additions, edits, and deletions to the Message Broadcasts list only when connected to the server.

This task is a step in *Process of Administering Notifications*.

To configure notifications caching

1. Navigate to the Administration - Server Configuration screen, then the Enterprises view.
2. From the Enterprise Servers list, select the enterprise server that runs the Siebel application with notifications settings you want to modify.
3. Navigate to the Component Definitions view, and select a component with a Component Type value of Application Object Manager.
4. In the Component Parameters list, select the Application Enable Message Broadcast Cache parameter, and type TRUE in the Value field.

   For details on how to configure the server component or Siebel Application Object Manager parameters, see *Siebel System Administration Guide* .

   Note: The default value for the Application Message Broadcast Cache Size parameter is 100. You probably do not have to increase this value. The minimum cache size is the ratio [refresh rate for the notification pane] / [message update interval]. For example, if the refresh rate is every 120 seconds, and the message update interval is every 10 seconds, then set the cache size parameter to at least 12.
5. Enable notifications caching for Developer Web clients (if any), and add or edit the EnableMsgbroadcastCache parameter in the [Siebel] section in your Siebel application's CFG file as follows:

   ```
   EnableMsgbroadcastCache = TRUE
   ```

Reviewing Notifications

Managers use notifications to communicate information to their direct reports and to others in the organization. If your application administrator provides you with the proper authority, then you can customize the behavior of notifications in your user preferences. For more information, see *Notifications Setup*.

You access notifications by clicking the Notification button on the *application toolbar*.

To review notification messages in the application

1. Click Notification (the exclamation mark icon) on the *application toolbar*.

   The notification pane opens where:
   - The messages that you have not read appear at the start of the Notification Summary list.
   - The messages that you have already read appear in the Previously Read section.
   - The message severity or level of importance attached to a message is illustrated by the color of the message, as described in *Notification Levels of Importance*.

     All notification messages are read-only. The following image shows an example of a notification pane.



2. Click a message to open and review the details of the message.
    - Click any attachment that is part of a message to open and view the attachment.
    - Click any hyperlink that is part of a message to navigate to the associated view.
    - Click the message again to close it after you have read it.
        - The message moves to the Previously Read section in the notification pane.
        - The counter beside the Notification button on the application toolbar decreases accordingly.
    - Tap Delete (the X icon) to delete a message after you read it.

      After you delete a message, the message disappears from the notification pane.
3. Click Mark as Read to clear all unread messages and mark them as read.

Notification Button and Pane

Note the following about the Notification button and pane, and accessing notifications:

- The counter beside the Notification button (the exclamation mark icon) on the application toolbar indicates the number of messages that are waiting for you to read.
- Read messages are not included in the message number that appears beside the Notification button.
- If there is more than one message waiting to be read, then the Notification button appears in the color associated with the most important (highest priority) unread message.
- When there are zero messages, then the Notification button displays zero.
- If the Notification button is blinking, then you have at least one unread message with a severity of Urgent with Alert.
- The Notification button stops blinking after the message is read.
- The Notification button does not blink if there are messages waiting to be read with only a Normal, High, or Urgent severity.
- When you click Notification on the application toolbar, the notification pane opens showing a summary of each message.
- Unread messages appear first and are sorted by message date.
- Read messages appear next in italic text, and they are also sorted by message date.
- When you expand a notification by selecting it, the details appear for that message.

Notification Levels of Importance

The level of importance or severity attached to a notification or to specific text in a notification message is indicated by the default color associated with the notification message. The following table describes the different levels of importance or severity that exist for notifications and the default color associated with each level in the preconfigured application.

The Notification button appears in different colors depending on the level of importance or severity attached to unread messages, and always in the color associated with the most important (highest priority) unread message. For example, if 3 unread messages exist, and if one message has a Normal level of importance, one message has a High level of importance, and one message has an Urgent level of importance, then the Notification button appears in the color associated with the Urgent message. If no unread messages exist, then the Notification button appears in the color associated with a Normal message.

Your application administrator can configure the color to associate with the different notification levels of importance by changing the style sheet for the application.

Notification Level of Importance or Severity	Default Message Color
Normal	Gray
High	Yellow
Urgent	Red
Urgent with Alert	Red

For each notification level of importance, it is recommended that you also configure the following user preferences on the Message Broadcasting form when setting up notifications so that users will be able to determine the importance of each notification message from its prefix:

- Prefix of Normal Priority Message
- Prefix of High Priority Message
- Prefix of Urgent Priority Message

For more information about configuring these user preferences for notifications, see *Notifications Setup*.