

Creating and Saving Queries in Siebel

This purpose of this document is to outline how to create and save queries for future use. The benefit of this is that predefined searches for specific data can be saved and pulled quickly to display just a desired record set.

By default, the initial query displayed when entering into a screen is the “** All...” query; however, queries can be changed and saved within any screen and can also be designated as a pre-default screen view. Meaning that when a screen is initially entered into, the pre-designated saved query will be the first view displayed (further explained later herein.) Or queries can be saved to be pulled at a later time, not affecting the pre-default screen view, so the “** All...” query will remain the first screen view displayed.

For this example we will be creating a saved query in the Opportunities Screen that will display only records for Opportunities with a “Status” field value of “Pending” and a “Location Desired” field value of San Antonio, TX.

When querying, since we can’t be certain if all Location Desired field values for San Antonio, TX contain the state abbreviation, or any other variation therein, we’ll be using the asterisk “query operator” to display all records that contain “San Antonio” anywhere in the value

- First, navigate to the desired screen view, in this case to the Opportunities screen.
- Click the “Query” button

The screenshot shows the Siebel user interface. At the top, there's a navigation bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below this is a tabbed interface with 'Epic', 'Accounts', 'Contacts', 'Opportunities', and 'Activities'. The 'Opportunities' tab is selected, and the 'Opportunities List' is displayed. In the 'Opportunities List' header, there are buttons for 'My Opportunities', 'Menu', 'New', and 'Query'. The 'Query' button is highlighted with a red rectangle. Below the header is a table with columns: 'Create Date', 'Opportunity Name', 'Location Desired (City, State)', 'Contact Last/First', 'Contact First', 'Guest Title (o)', 'Last Completed', and 'Next Scheduled'. The table contains three rows of data.

Create Date	Opportunity Name	Location Desired (City, State)	Contact Last/First	Contact First	Guest Title (o)	Last Completed	Next Scheduled
5/3/2013 11:49:03 AM	EXEC_973324102	West Des Moines, IA					
5/3/2013 10:19:03 AM	EXEC_650441783	Tomball, TX					
5/3/2013 6:13:03 AM	EXEC_231231245	Kansas City, MO			pam working on		

- Next, enter the San Antonio value bounded by asterisks (*San Antonio*) into the Location Desired field. This will ensure that all values with “San Antonio” anywhere in the value will be returned.
- In the “Status” field, select “Pending” from the drop down list.
- Then click “Go”.
- The resulting record set is all Pending Opptys with a Location Desired of San Antonio, TX.

Opportunity: Saved Queries:

Epic | Accounts | Contacts | Opportunities | Activities

Opportunities List

Opportunity: My Opportunities Menu Go Cancel Query Assistant Enter Query

Create Date	Opportunity Name	Location Desired (City, State) (o)	Contact Last/First	Contact First	Guest Title (o)	Last Completed	Next Schedule	Corporate Name (o)	Status
<Case Required>	<Case Required>	San Antonio*	<Case Required>	<Case Required>	<Case Required>	<Case Required>	<Case Required>	<Case Required>	<Case Required>

San Antonio*

More Info | Guest Needs | Activities | Notes | Attachments | Contacts | Calendar

Opportunity The selected filter

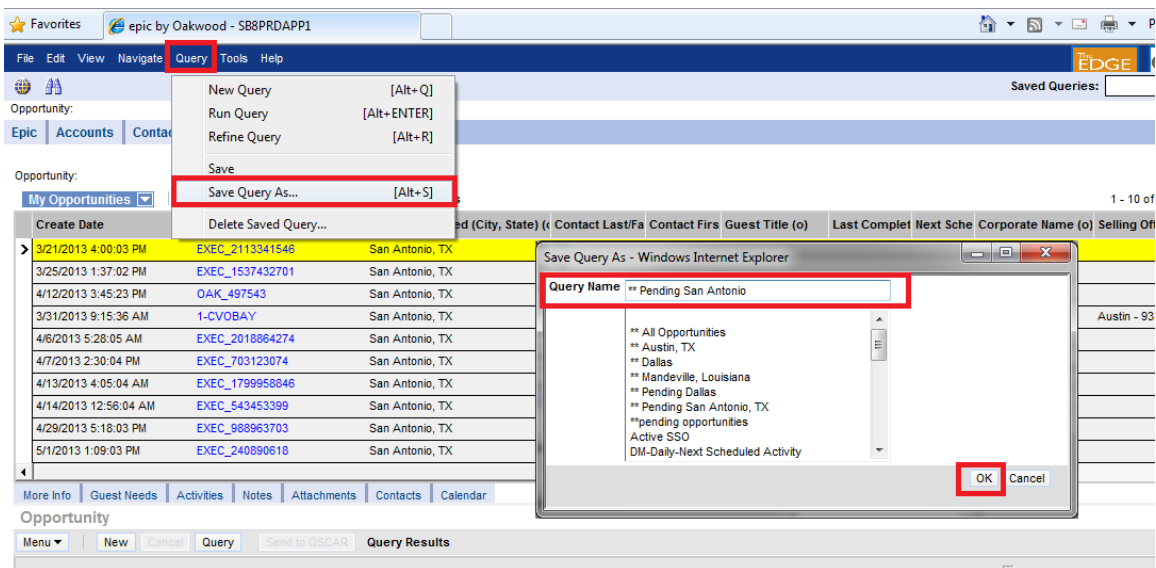
Menu | New | Go | Cancel | Query Assistant | Enter Query

Account/Contact Information	Opportunity Information	Opportunity Sub-Type:	Eligible for Commission
Corporate Name (o):	Status (o):	<Case Required>	Referring (W)AC/L
<Case Required>	Pending	*Created Date:	<Case Required>
Corporate Number (o):	Status Updated:		Referring (W)AC/L

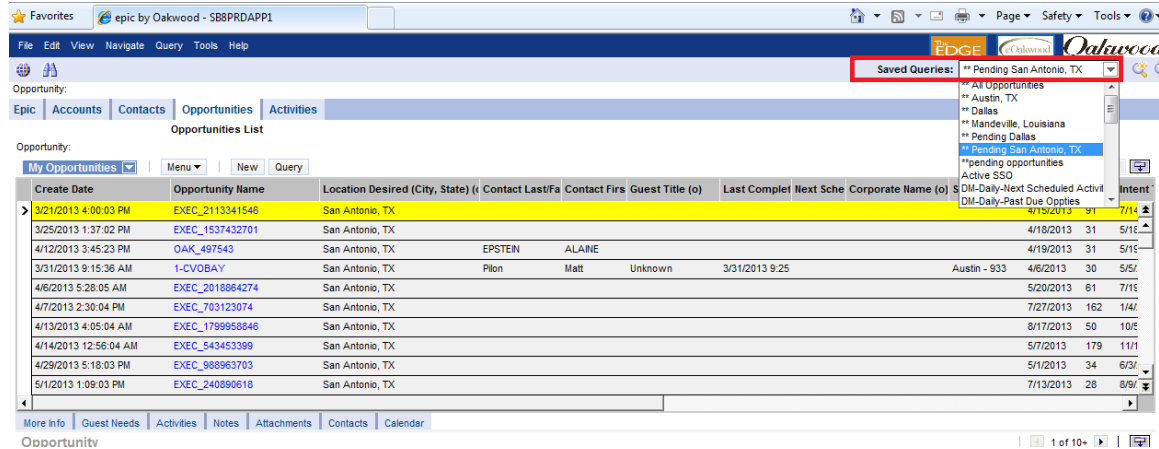
Saving a Query

There are two ways to save queries in Siebel. You can either save it as a pre-default screen view or you can save it as a query to be pulled after initial entry into the screen has been made. Initial entry into a screen most usually will display the All Opportunities query view.

- To save this query as a Pre-Default screen view click Query/Save Query As.
- When the “Save Query As” window pops up, name the query with two asterisks, a space and then the name (** Pending San Antonio) you can use whichever name you would like the name to be, but you must precede the name with two asterisks and a space. What to keep in mind here are the preceding asterisk/space and their placement within the name.
- Saving a query named with two asterisks/space/name will create a query to be pulled later.
- Saving a query named with one asterisk/space/name will create a pre-default screen view query, which as you remember will be the first view displayed upon screen entry. After changing a pre-default screen view, the “All...” queries can still be pulled from the “Saved Queries” drop down.



After the Query has been saved, it can then be pulled from the Saved Queries drop down.



Below is a list of all query operators that can be used during a query and saved for future use.

Table 11. Simple Query Operators

Operator	Description	Example
*	<p>Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space.</p> <p>You cannot use * to find dates.</p> <p>To find words on more than one line in a field, you should use * to separate the words. You cannot query for control characters or nonprintable characters, such as line feeds (LF) or carriage returns (CR).</p>	<p>*rang* finds <i>arrange</i>, <i>arranged</i>, <i>orange</i>, <i>orangutan</i>, <i>range</i>, <i>ranges</i>, <i>ranging</i>, <i>rang</i>, <i>strange</i>, <i>stranger</i>, <i>strangest</i>, <i>strangle</i>, <i>wrangle</i>, and so on.</p> <p>NOTE: If performance is poor when you use the asterisk (*), substitute "IS NOT NULL" in your query. This often improves performance, and will return the same sets of records.</p>
?	<p>Wildcard operator. Placed anywhere in a string, returns records containing the characters specified in the string plus any one additional character that appears at the location of the question mark.</p>	<p>?rag finds <i>brag</i>, <i>crag</i>, or <i>drag</i>.</p> <p>t?pe finds <i>type</i> and <i>tape</i>, but not <i>tripe</i>.</p>
""	<p>Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order.</p>	<p>"Sun Solaris" finds records that contain <i>Sun Solaris</i> in the query field.</p>
=	<p>Placed before a value, returns records containing a value equal to the query value.</p>	<p>=Smith finds all records for which the value in the query field is <i>Smith</i>. It also turns off wildcards within the query value.</p>
<	<p>Placed before a value, returns records containing a value less than the query value.</p>	<p><6/20/01 finds all records in which the value of the query field is before 20 June 2001. When entering a date, use the format that is specific to your implementation.</p>
>	<p>Placed before a value, returns records containing a value greater than the query value.</p>	<p>>5/31/01 finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.</p>

Table 11. Simple Query Operators

Operator	Description	Example
<>	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 <i>Paris</i> .
<=	Placed before a value, returns records containing a value less than or equal to the query value.	<=500 finds all the records in which the value in the query field is less than or equal to 500.
>=	Placed before a value, returns records containing a value greater than or equal to the query value.	>=500 finds all records in which the value in the query field is greater than or equal to 500.
NOT LIKE, not like	Placed before a value, returns records not containing the value.	NOT LIKE Smi* finds all records in which the value in the query field do not start with <i>Smi</i> .
IS NULL, is null	Placed in the query field, returns records for which the query field is blank.	Enter IS NULL in the Due Date query field to find all records for which the Due Date field is blank.
IS NOT NULL, is not null	Placed in the query field, returns records for which the query field is not blank.	Enter IS NOT NULL in the Due Date query field to find all records for which the Due Date field is not blank.
~	Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case.	~LIKE Smi* finds all records in which the value in the query field starts with <i>Smi</i> , <i>smi</i> , <i>SMI</i> , and so on. Using this operator may affect performance.