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Siebel 8.1.x Tools
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Configuring a Siebel Application

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Objectives

After completing this lesson you should be able to:

- Explain the role of object definitions in Siebel applications
- Identify the basic steps to configure a Siebel application

Siebel Customer Relationship Management (CRM)

- Enables you to manage interactions with customers, partners, and employees
 - Is typically deployed as a single application with broad functionality
 - Supports multiple communication channels such as Call centers, the Web, and email
- Uses a single database to:
 - Allow all users access to the same set of data
 - Example: The correct customer order status is seen by all relevant users
 - Ensure changes to data are made once and only once
 - Example: An address is updated in only one place
- Is a packaged application with built-in best practices

Siebel CRM Applications

- Are available tailored for:
 - Different types of customer, partner, or employee interactions and channels (horizontal applications)
 - Different industries (industry applications)
- Examples:
 - Horizontal applications
 - Siebel Sales
 - Siebel Call Center
 - Siebel Partner Portal
 - Industry applications
 - Siebel Financial Services
 - Siebel Consumer Goods
 - Siebel Public Sector

Comparison of Siebel CRM Applications

- Siebel functionality is delivered as separate horizontal or vertical applications that:
 - Have the same user interface and navigation
 - Are based on the same underlying application architecture
 - Use the same underlying technologies for automation, integration, and so on
 - Share many of the same application screens
- Applications use the same executable, but use a different configuration file and repository file
 - A configuration file is used to specify application parameters
 - A repository file determines the application's behavior

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Comparison of Siebel CRM Applications

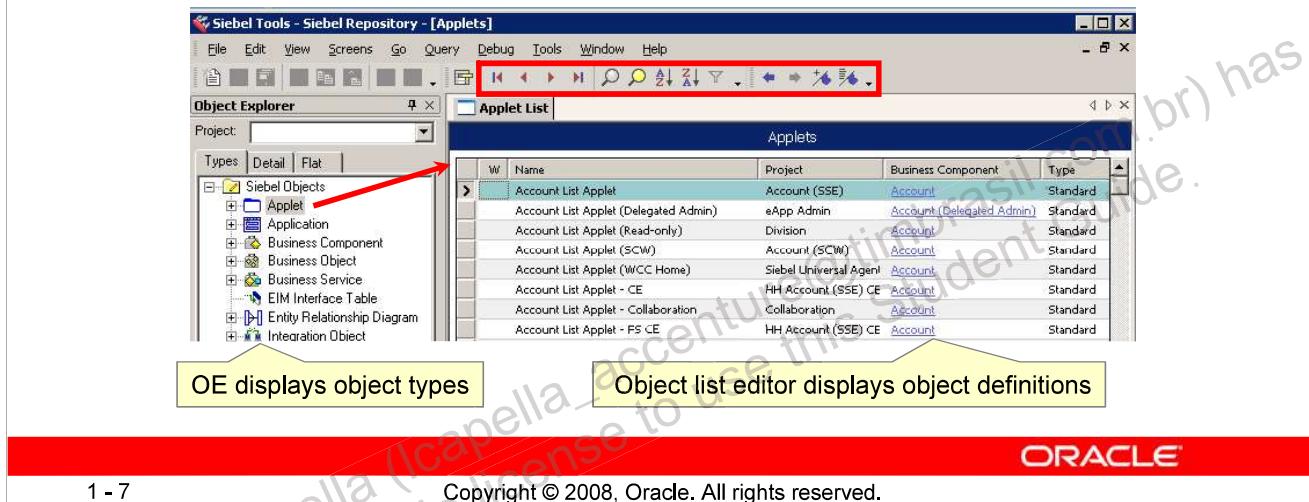
Parameters are also specified at the server or object manager level through parameter settings.

Configuring a Siebel Application

- Configuring is the process of modifying the as-delivered Siebel application to meet business needs
- Developers edit and create object definitions
 - Are data constructs that define elements of the:
 - User interface
 - Business logic
 - Data storage
- Developers do not:
 - Modify code in the Siebel application
 - Write SQL directly

Siebel Tools

- Is a special Siebel client used by developers to examine, create, and edit object definitions
- Has a different user interface than the client application
 - Displays an object explorer (OE) and an object list editor
 - Has toolbar icons for common user operations

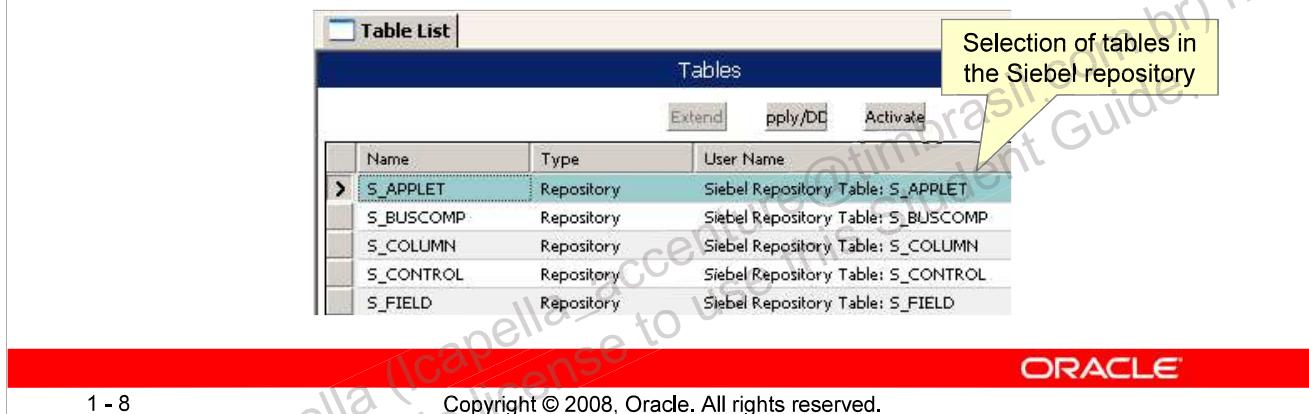


Siebel Tools

Reference: "About the Siebel Tools User Interface" in *Using Siebel Tools*

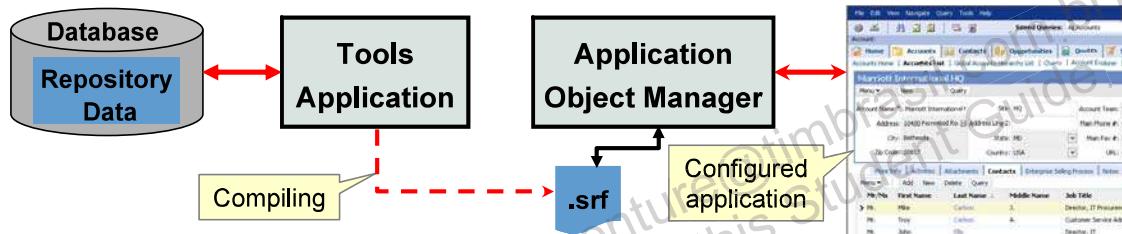
The Repository and Siebel Tools

- The Siebel repository:
 - Is a subset of tables in the Siebel database that store object definitions
 - Consists of tables that correspond to object types
 - Each row corresponds to an object definition
- Siebel Tools accesses the repository tables, not user data tables



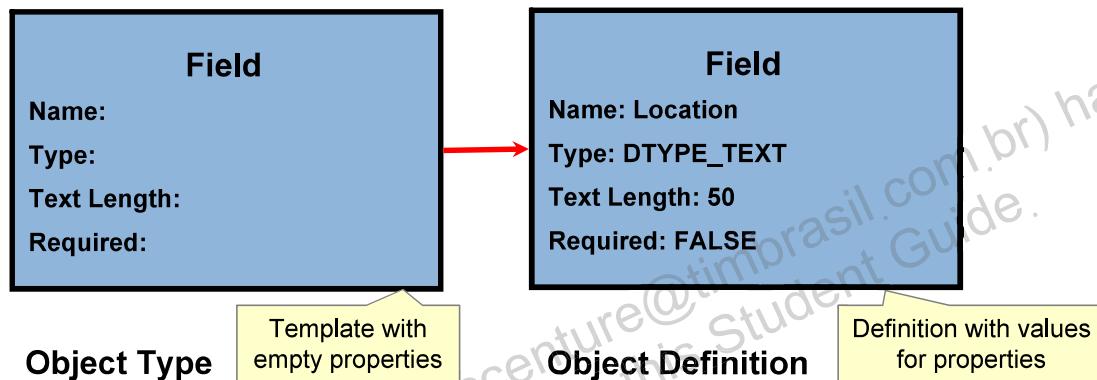
Siebel Repository File

- Is a separate file that contains object definitions in a compressed form for rapid access during run time
- Is generated by using Siebel Tools to compile object definitions in the repository
 - Often referred to as the .srf file



Object Definitions

- Consist of a set of properties with assigned values
 - Property values control application behavior
- Are created from a template called an object type

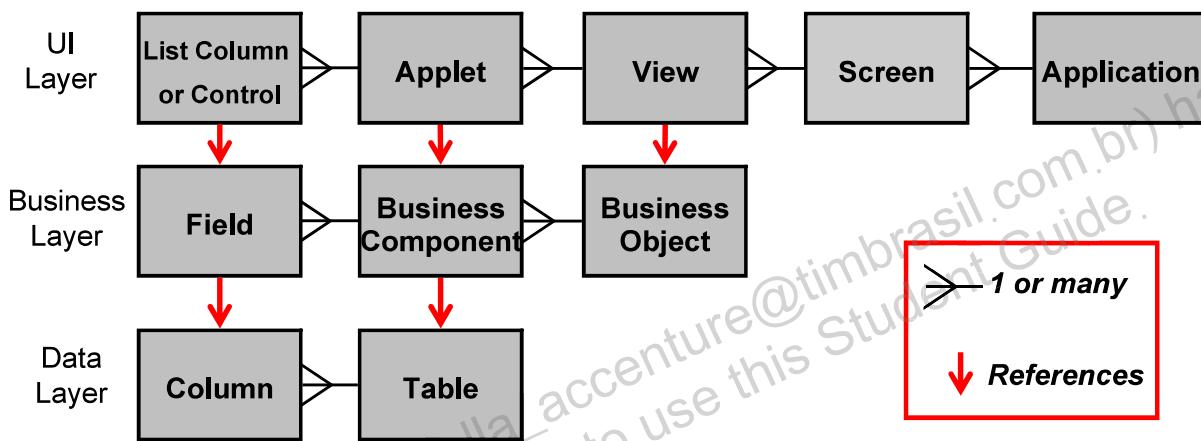


Object Definitions

Reference: “Overview of Configuring Siebel Applications” in *Configuring Siebel Business Applications*

Object Definitions

- Are grouped into three major layers with different subject matters and refer to definitions in the next lower layer
 - Developers modify object definitions in different layers to configure different aspects of the application



User Interface Layer

- Siebel as-delivered applications include a predefined set of screens, views, lists, forms, and their associated templates

The screenshot shows the Siebel Service Requests List interface. At the top, there's a navigation bar with links like Home, Accounts, Contacts, Opportunities, Sales Orders, Service, and Quotes. Below the navigation is a toolbar with buttons for New, Delete, Cancel, Query, Smart Answer, Auto-Quote, Verify, Verify Best Time, and Create Case. The main area has a title bar '130258-2566294'. The interface is divided into several sections:

- SR Information:** Contains fields for SR # (130258-2566294), Type (Social Services), Last Name (Smith), First Name (Dana), Area (Referral), Sub Area (Housing), Last Updated By (CWEST), Site, CSM #, Contact Account, Phone # (312) 405-0987, Email (dana.smith@dhs.gov), Source (Web), and Reproducible. It also includes a 'Customer Time Zone' section with fields for Opened, Committed, and Closed.
- Status and Ownership:** Shows Status (Open), Sub Status (Unassigned), Priority (3-Medium), Owner (DSMITH), Creator (DSMITH), Group, Organization (Default Organization), and Severity.
- Summary:** Displays a note: "Current housing is being condemned - Knight family requires alternative housing (See Attachment)".
- Detailed Description:** A yellow callout box points to this section with the text "As-delivered view and applets".
- Activities:** A list view showing one activity: "Please Research Referral in Agency Database" (Type: Web Update, Start: 04/14/2004 1:00:38 AM, Due: N/A, Status: Done).

At the bottom, there's a red footer bar with the text "1 - 12", "Copyright © 2008, Oracle. All rights reserved.", and the "ORACLE" logo.

Tailoring the Logical User Interface

- Developers tailor the as-delivered Siebel screens, views, lists, and forms to better support users' business needs

The screenshot shows a Siebel application interface. At the top, there's a navigation bar with links like Home, Accounts, Contacts, Opportunities, Sales Orders, Service, and Quotes. Below the navigation bar, the main window title is "Service Request Detail". Inside, there's a form for a service request with fields for SR number, First name, Last name, and email. A summary text area contains a note about housing being condemned. A yellow callout box points to this area with the text "A tailored view and applet". Below the form is a table titled "Activities" with one row visible, containing a task description and details like type and start date. The bottom of the screen has a red footer bar with the Oracle logo and copyright information.

A tailored view and applet

SR: 130258-2566294 First: Dana Opened: 04/14/2004 12:58:07
Severity: Last: Smith Closed:
Summary: Email: dana.smith@dohs.gov
Current housing is being condemned - Knight family requires alterna Phone: (312) 405-0987

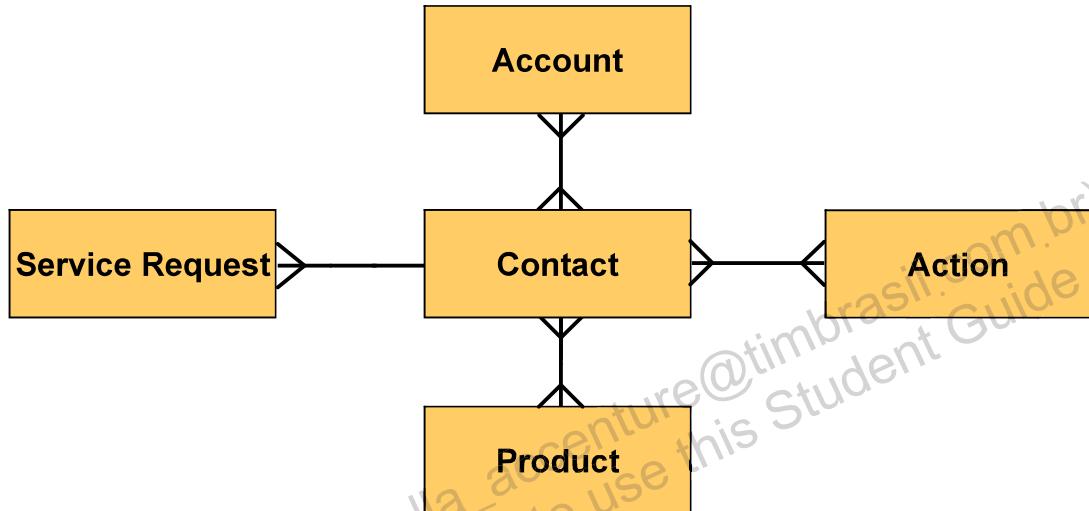
New	Description	Type	Start	Due	St
>	Please Research Referral in Agency Database	Web Update	04/14/2004 1:00:38 AM		

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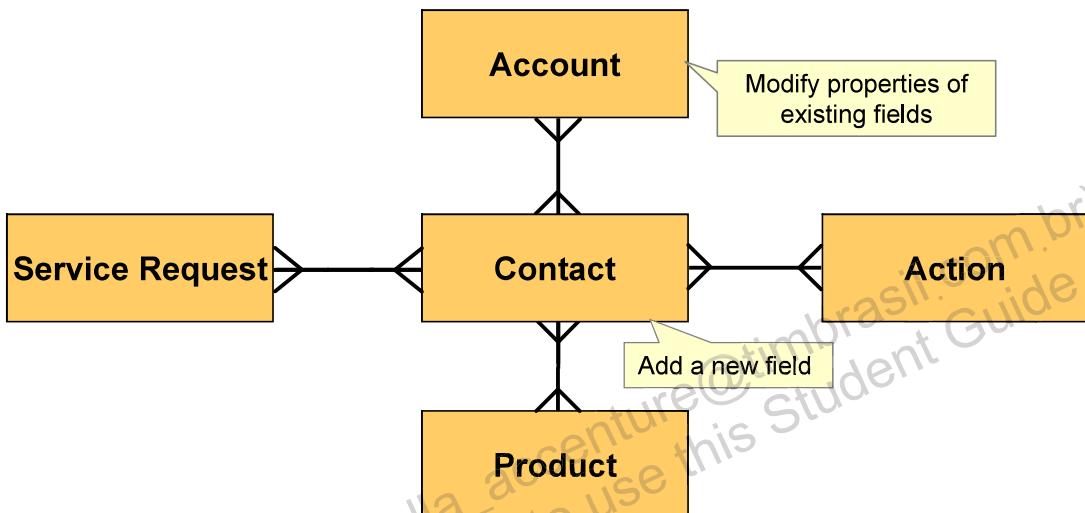
Business Layer

- Siebel applications are configured to support the as-delivered application logic and relationships



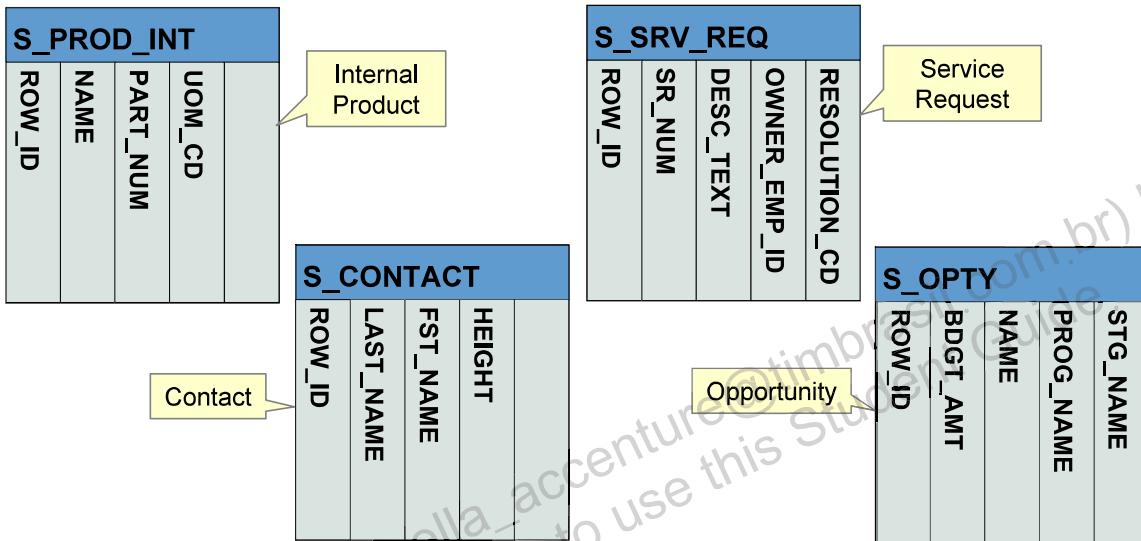
Tailoring the Business Layer

- Developers tailor the business components and business objects to support custom application logic and relationships



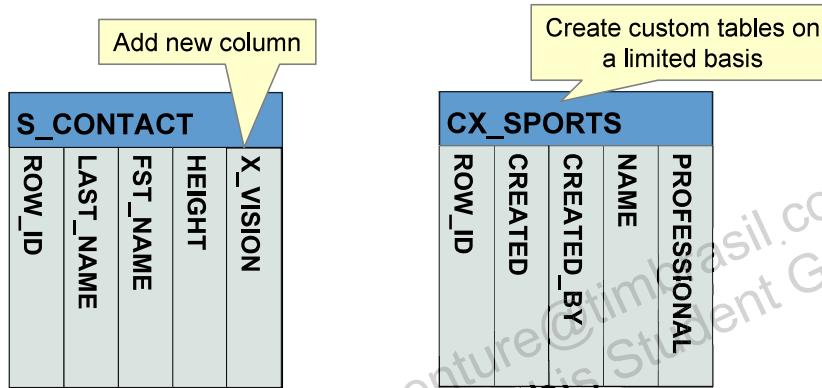
Data Layer

- Siebel as-delivered applications contain a large set of predefined database tables.



Extending the Data Layer

- Developers can tailor the application by adding columns or tables in a limited and controlled manner



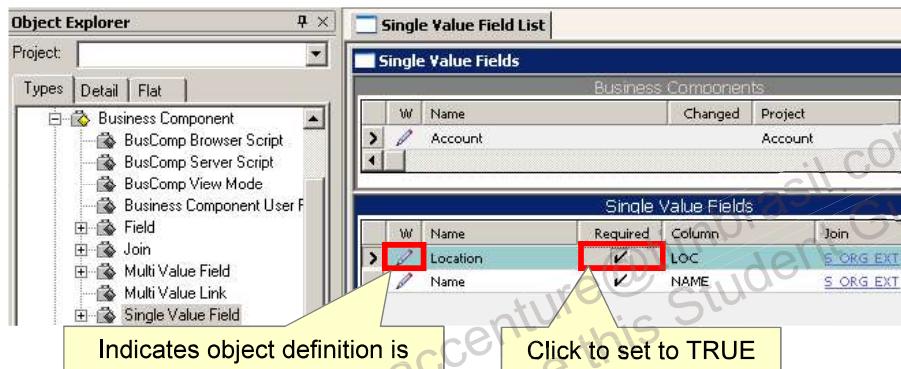
Basic Configuration Steps

- Create or edit object definitions
- Compile the edited object definitions
- Test the modifications



Create or Edit Object Definitions

- In this step, developers use Siebel Tools to:
 - Navigate to the desired object definition
 - Edit the properties in the list editor as required
 - The project must be locked to allow editing



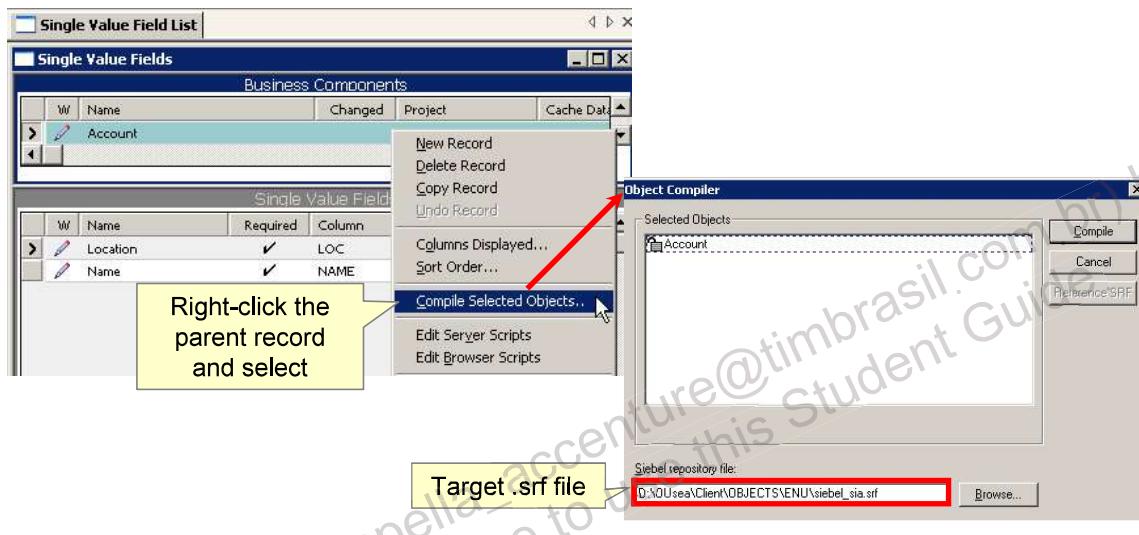
Create or Edit Object Definitions

Locking Projects

- In order to edit an object definition, the object, or the project the object belongs to, must be locked. How to lock project will be discussed in the following lesson.

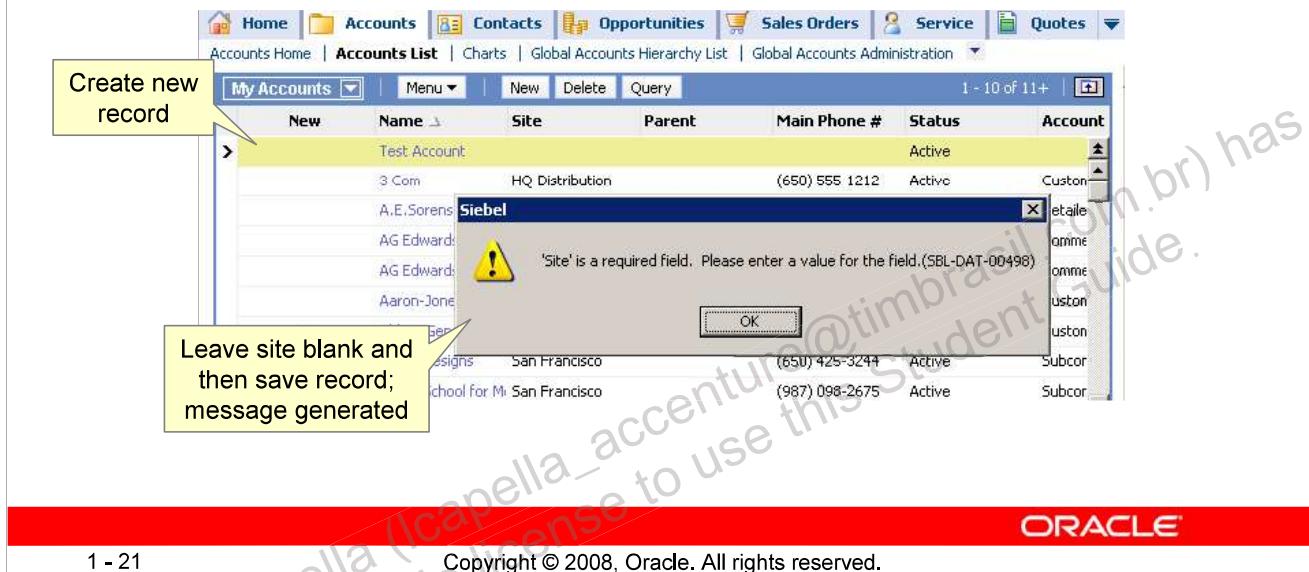
Compile the Edited Object Definitions

- In this step, developers use Siebel Tools to:
 - Compile the modified object definition into the existing .srf file used by the client application



Test the Modifications

- In this step, developers:
 - Start the Siebel client with the modified .srf file
 - Verify that the configurations were successfully implemented



Lesson Highlights

- Configuring is the process of using Siebel Tools to modify an as-delivered Siebel application
- Developers tailor:
 - The as-delivered Siebel screens, views, lists, and forms to better support users' business needs
 - The business components and business objects to support custom application logic and relationships
 - The database tables by adding columns or tables

Practice 1 Overview: Configuring a Siebel Application

This practice covers the following topics:

- Performing the basic configuration steps to implement a simple business requirement

Editing and Compiling Object Definitions



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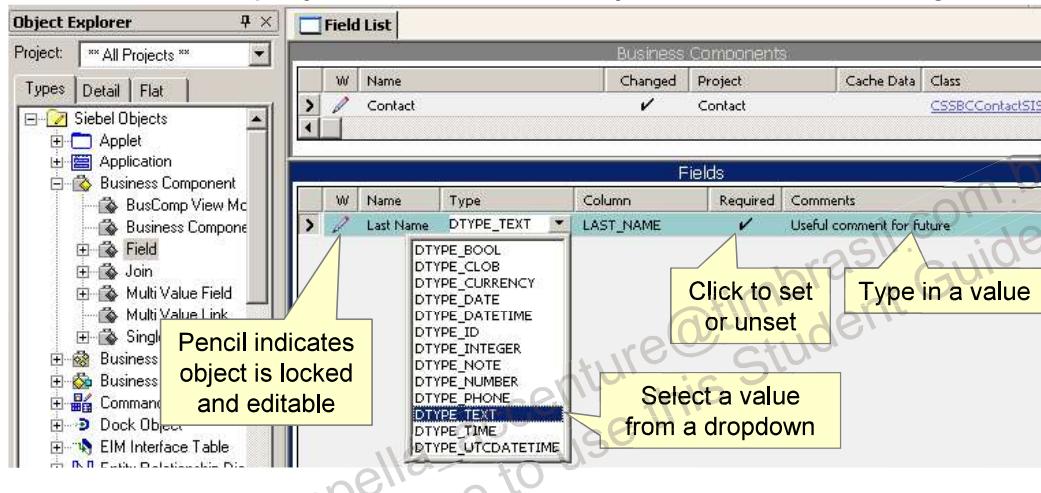
Objectives

After completing this lesson you should be able to:

- Create new and edit existing object definitions
- Validate edited object definitions
- Compile object definitions into a repository file

Editing An Object Definition

- Select the type in the Object Explorer and select the object definition in the object list editor
- Assign or change property values
 - Lock the project to which the object definition belongs



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Editing An Object Definition

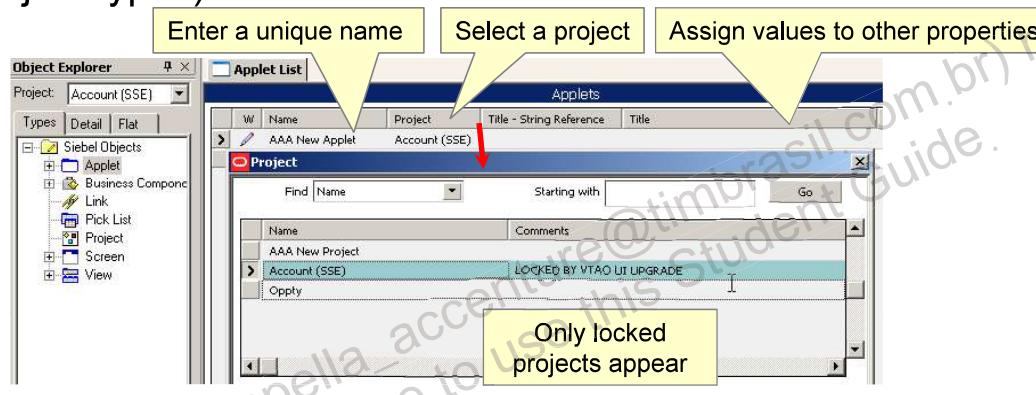
Tabbing in the Object List Editor

- It is recommended that you tab to navigate from property to property in the list editor. If you navigate by scrolling and clicking in a property, you may inadvertently change the value of a Boolean property.

Reference: “Working with Objects” in *Using Siebel Tools*

Creating a New Object Definition

- Create a new object manually
 - Select the desired object type in the Object Explorer
 - Create a new record in the object list editor
 - Assign values to properties
- Alternatively use a new object wizard (provided for many object types)



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Creating a New Object Definition

Recommended Practice:

- Use a consistent prefix to name new object definitions so they are easy to distinguish from existing (as-delivered) definitions.
- Use the new object wizards provided for many object types to create new object definitions. The wizards are designed to make sure that all required properties are entered.

Symbolic Strings

- Are text strings stored in the repository as Symbolic String object definitions
- Are defined in one place, but referenced in many places
 - Enable global updates of text strings when necessary
 - Assist translation into other languages
- Are referenced by user interface objects such as titles and captions
 - Ensure that the same name appears exactly the same way throughout the application

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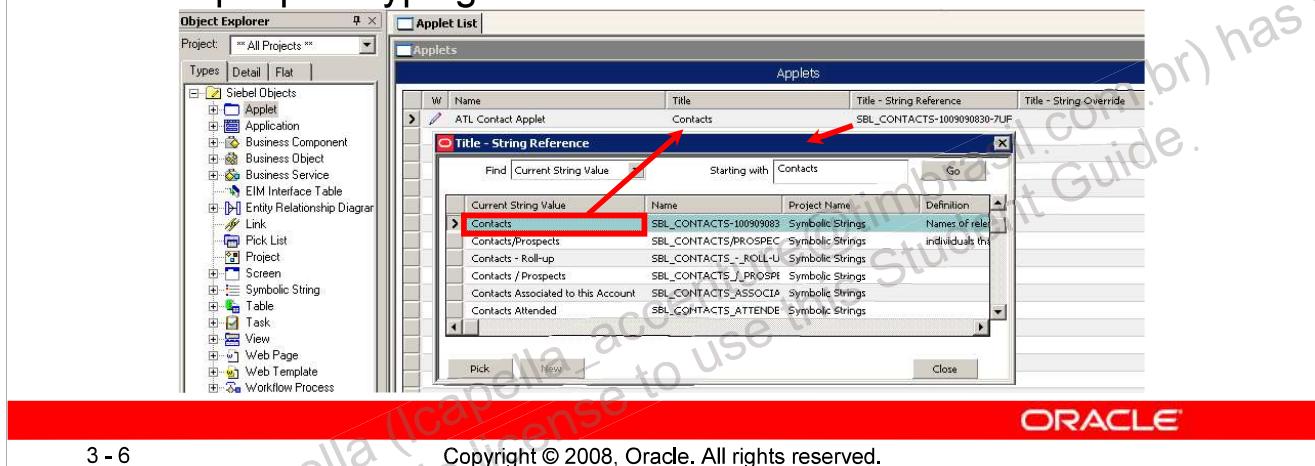
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Symbolic Strings

Reference: “Working with Strings and Other Locale-Specific Data” in *Using Siebel Tools*

Using Symbolic Strings

- Enter a text string by selecting the corresponding string reference from the picklist
 - A very large number of symbolic strings are provided
- Create a symbolic string if the desired string does not exist
- Use a string override only for infrequent exceptions and rapid prototyping



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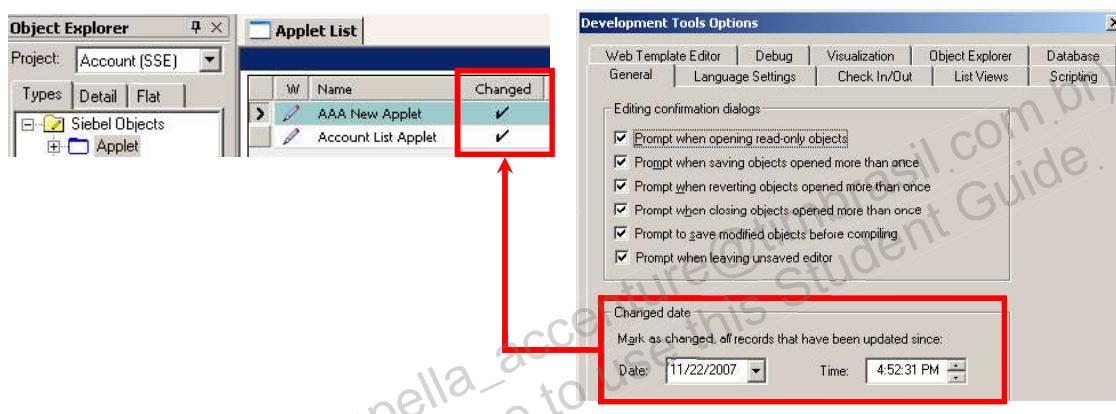
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Using Symbolic Strings

The EnableToolsConstrain parameter in the Tools.cfg file can be set to TRUE to require developers to use the available string references. They cannot create new string references or create a string override. The default value for the EnableToolsConstrain parameter is FALSE.

Changed Flag

- Indicates records that have been modified since a stated date
- Is set whenever a record is edited
- Can be cleared by modifying the changed date value (Select View > Options)



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Changed Flag

The Changed flag indicates only that the record has been touched. A developer may change the value of a property and then undo the change. The Changed flag will still be set. The Changed flag is not set if you perform an Undo Record.

Some developers find it useful to select an object type and then query for all object definitions with the Changed flag set. This then displays in the list editor only those definitions they have edited.

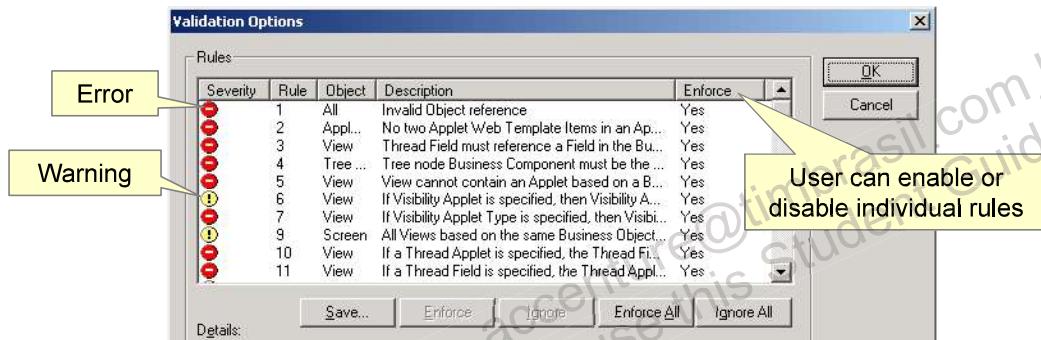
Changed Date

The Changed Date defaults to the date that Siebel Tools was first opened. However it can be set to a variety of other dates to allow developers to select sets of object definitions such as:

- Date of the last major deployment
- Date of last compile
- Date that a project was checked out

Validation

- Determines the correctness of selected object definitions in the repository
 - Includes all child object definitions for the selected parent definitions
- Is based on a set of Siebel-defined rules

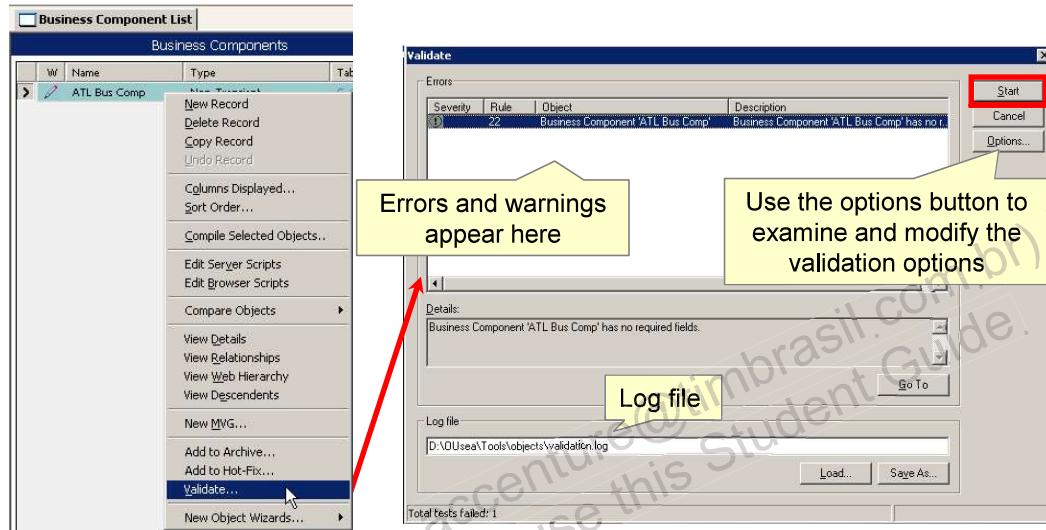


Validation

The validation feature checks for many possible problems, but is not designed to catch every possible issue.

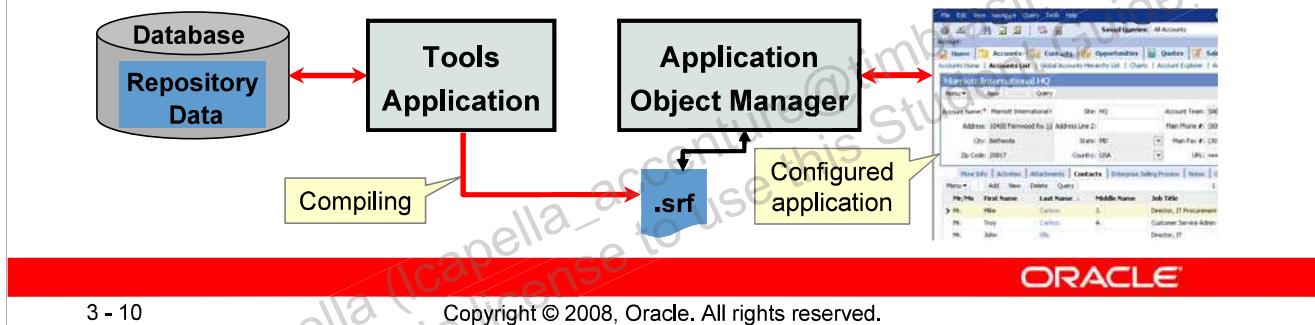
Validating an Object Definition

- Select and then right-click the object definition
- Select Validate and click Start



Compiling

- Updates an application's repository file (.srf) with the latest versions of object definitions
 - Reads object definitions from the repository and creates a proprietary file to be accessed by the application at run time
- Is performed by a developer to test the modified definitions
 - Compile into the .srf file located in the objects directory of the client application
 - Can compile both individual object definitions or projects



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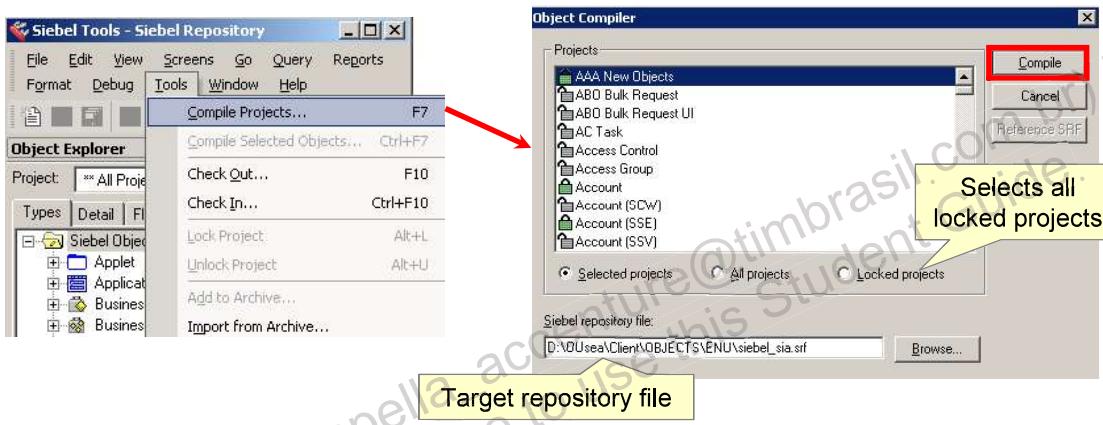
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Compiling

Reference: “Compiling and Testing” in *Using Siebel Tools*

Compiling Projects

- Compile all projects when starting and at milestones
 - Generates a new .srf file
- Compile a subset of projects for an incremental compile
 - Updates only the selected projects
- Select Tools > Compile and select project(s)

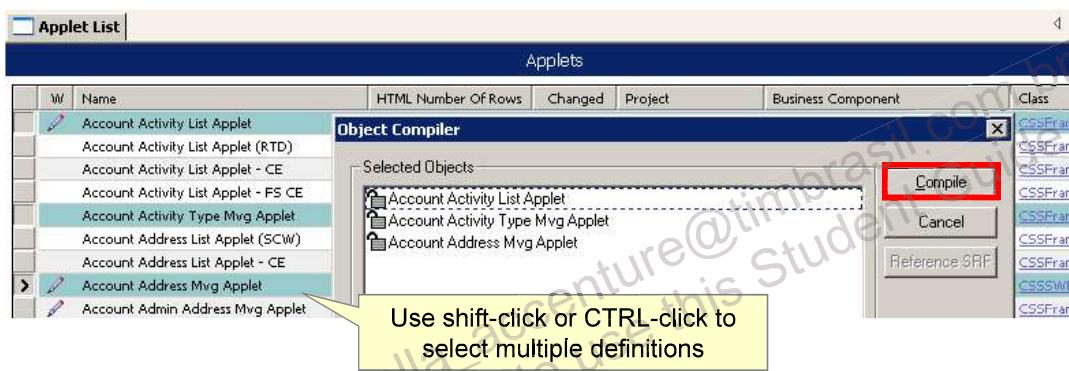


Compiling Projects

Compile *locked* projects to make sure that you compile all object definitions that you have changed. Compile *selected* projects when you have made changes to a single project. This is also useful when you have performed a Get projects and need to compile those projects.

Compiling Object Definitions

- Top-level object definitions can be compiled individually
 - Compiles all child object definitions as well
 - Is useful for immediate testing after modifying a single object definition
- Select one or more object definitions, then right-click and select Compile Selected Objects

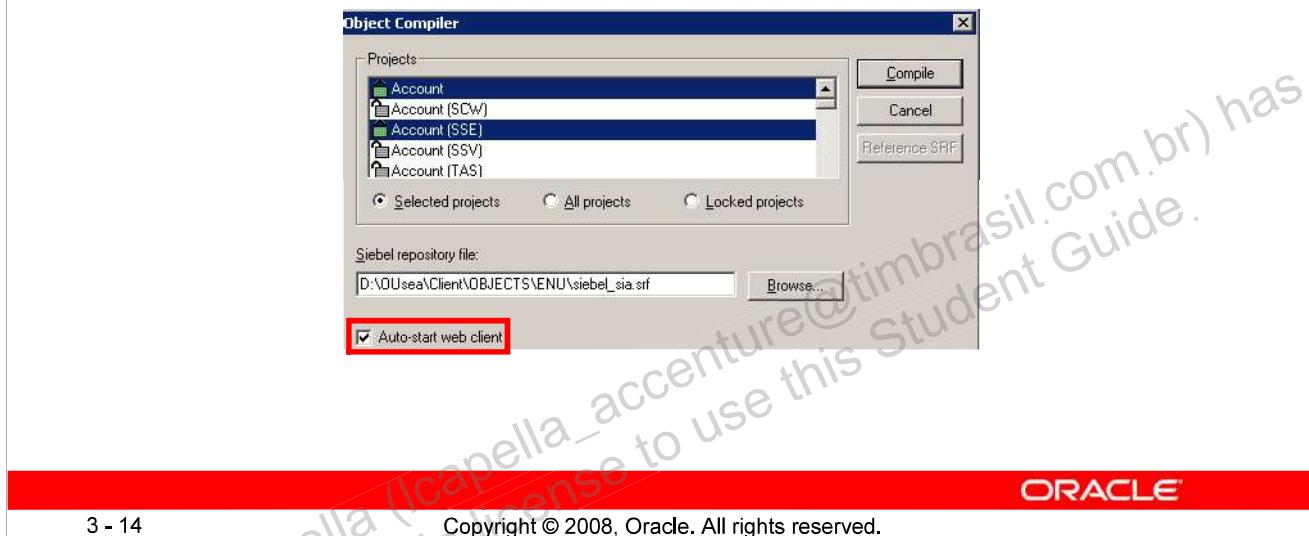


Rapid Unit Testing

- When object definitions are compiled into a client .srf file:
 - All local instances of the Developer Web client are first closed
 - The objects definitions are compiled into the .srf file
 - All local instances of the Developer Web client are then reopened
 - Each client returns to the active view prior to closing

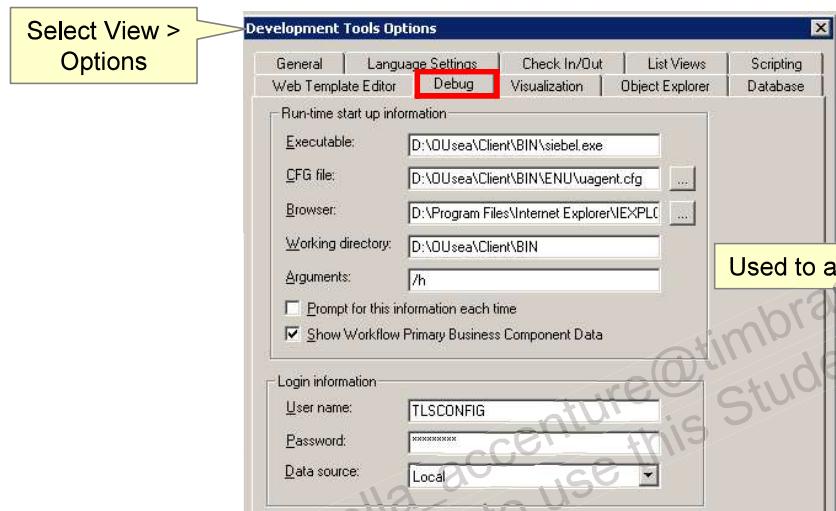
Auto-starting the Web Client

- When there is no local client running, checking “Auto-start web client” automatically starts the Developer Web Client application after compilation has completed



Debug Settings

- Specify client parameters in Options > Debug
- Are used to start the client from Siebel Tools for debugging or for auto-start



Basic Configuration Strategy

- Use existing object definitions in the as-delivered repository whenever possible
 - Ensures that the application can be upgraded with minimal effort
- Explore the application and repository to see if existing definitions can satisfy the requirement
 - Repository often contains groups of similar definitions



Recommendations: Object Definitions

- Modify definitions as required, rather than creating new ones
 - Creating new object definitions can lead to redundant configuration and increase the maintenance effort
- Do not delete, make inactive, or rename seemingly unused object definitions
 - Other object definitions might reference them
 - Deleting does not save memory, storage space, or improve performance

Recommendations: Projects

- Create new projects on the server to avoid naming conflicts and project bloat
 - Assign this task to a single person on your development team (such as the project manager)
- Assign all object definitions you create to the new projects
- For projects with a large number of object definitions consider moving the few definitions to be edited into a separate project
 - For example: this is the recommended approach for the Symbolic Strings project when modifying a symbolic string

Lesson Highlights

- Object definitions can be created and edited once the project is locked
- Validation determines the correctness of object definitions
- Compile to produce the .srf file used to test a configuration
- Compiling:
 - Reads object definitions from repository tables
 - Creates a file (.srf) accessed by the Siebel application at run time
- Rapid Unit Testing allows developers to test changes using the Developer Web Client

Practice 3 Overview: Editing and Compiling Object Definitions

This practice covers the following topics:

- Creating a new project
- Editing and compiling object definitions

Managing Object Definitions

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Objectives

After completing this lesson you should be able to:

- Archive object definitions and projects
- Back up the local database and the repository file
- Compare object definitions

Archiving Object Definitions

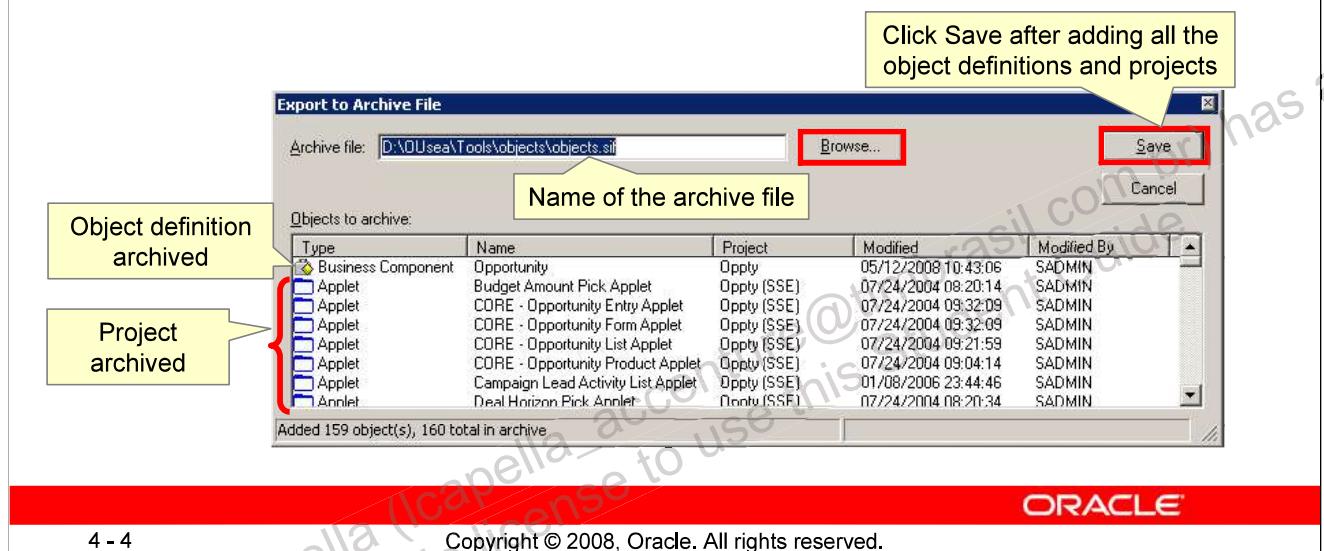
- Object definitions:
 - Can be exported to an archive file (.sif by default)
 - Both individual objects and projects can be archived
 - Are stored in a platform and database-independent format
 - Uses an XML-like format
 - Can be imported into a different repository
 - Must be the same Siebel release version
- Archive files can be used to:
 - Share object definitions/projects among developers
 - Transfer object definitions/projects from one repository to another
 - Back up object definitions/projects for a development effort

Archiving Object Definitions

Reference: “Working with Archive Files” in *Using Siebel Tools*

Exporting Object Definitions

- To export definitions:
 - Select the object definition or the project
 - Select Tools > Add to Archive
 - Provide the name of the archive file



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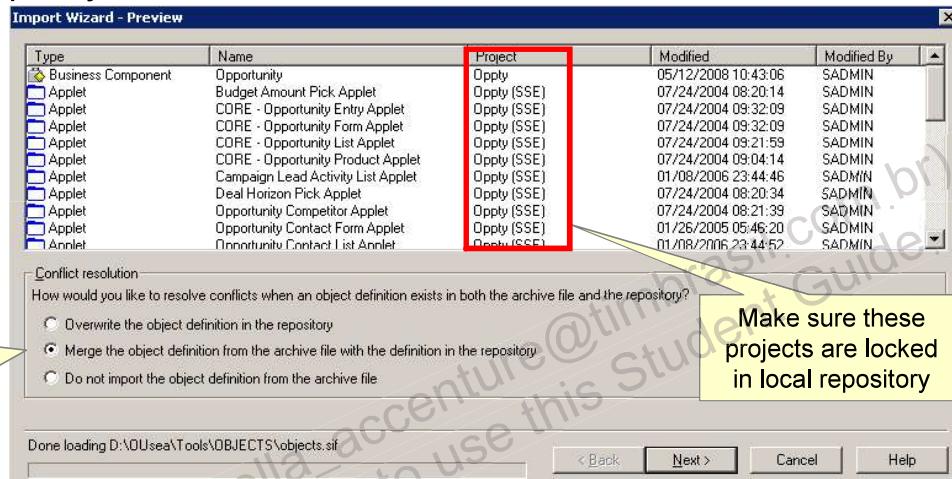
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Exporting Object Definitions

Note that you cannot add object definitions to a previously saved archive. You can create a new archive file and continue to add object definitions and projects until you save the archive.

Importing Object Definitions

- Copies definitions from an archive file into a developer's local repository
 - Select Tools > Import from Archive
 - Specify the archive file



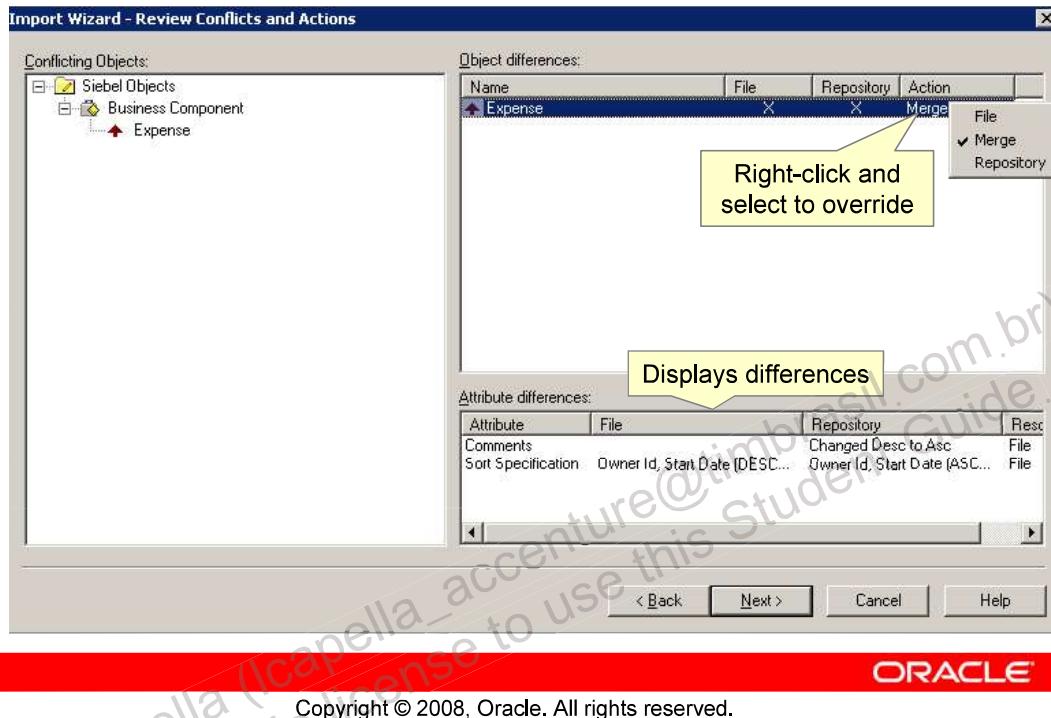
Conflict Resolution

- Determines how to handle situations in which a top-level object definition in the archive and the repository differ
 - Is set for the import as a whole
 - Can be overridden for individual object definitions

Option	Action
Overwrite	Delete the object and its children in the repository and replace them with the version in the archive file
Merge	Update properties of objects with values from the archive Add new child objects to the repository version if they exist in the archive Do not delete child objects in the repository version that are not also present in the archive
Do not import	Do not make any changes to the objects in the repository

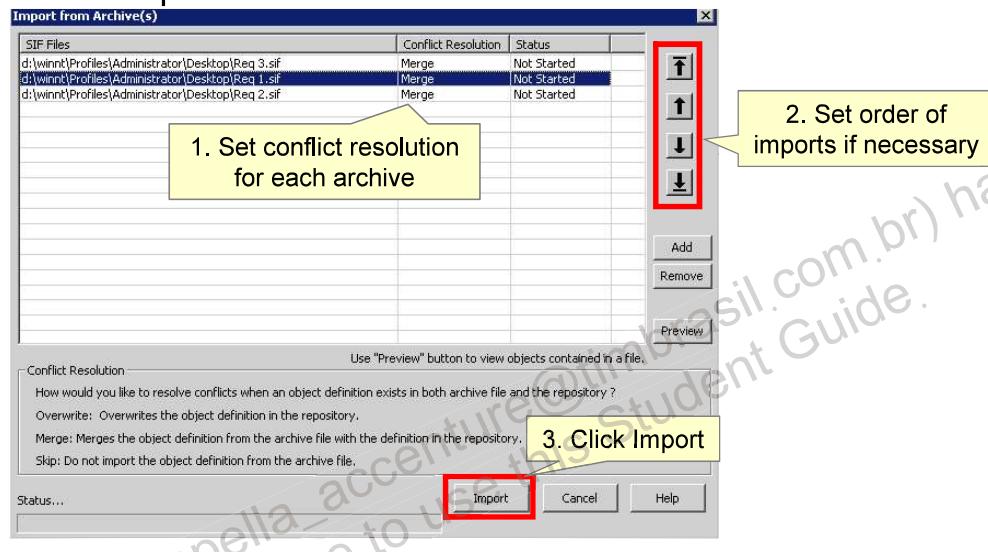
Resolve Import Conflicts

- Set actions for individual object definitions as needed



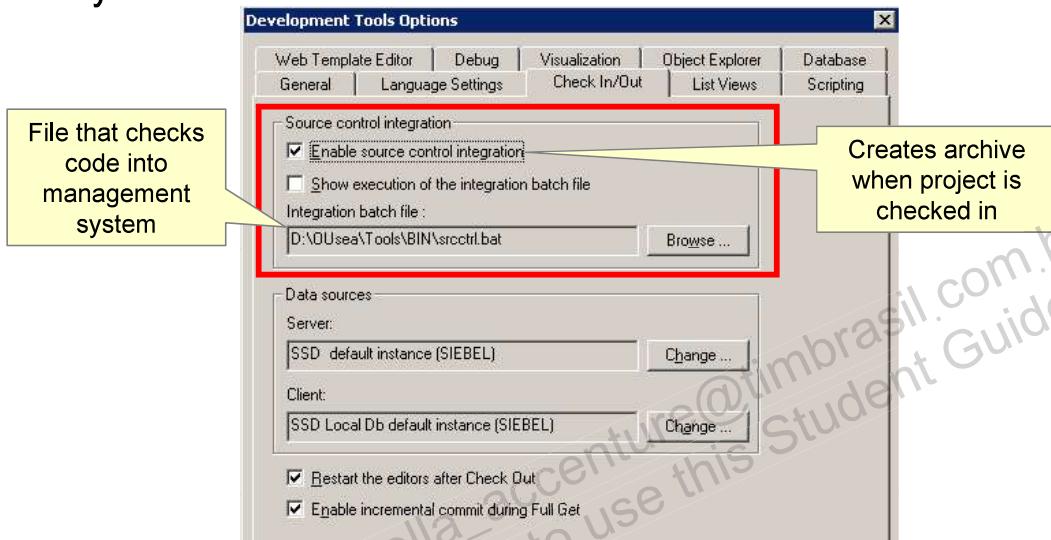
Importing Multiple Archive Files

- Multiple archive files can be imported in a single operation
 - Select Tools > Import from Archive(s)
 - Select multiple archive files



Source Code Control Integration

- If enabled, whenever a project is checked in, an archive file is generated and stored in a source code control system

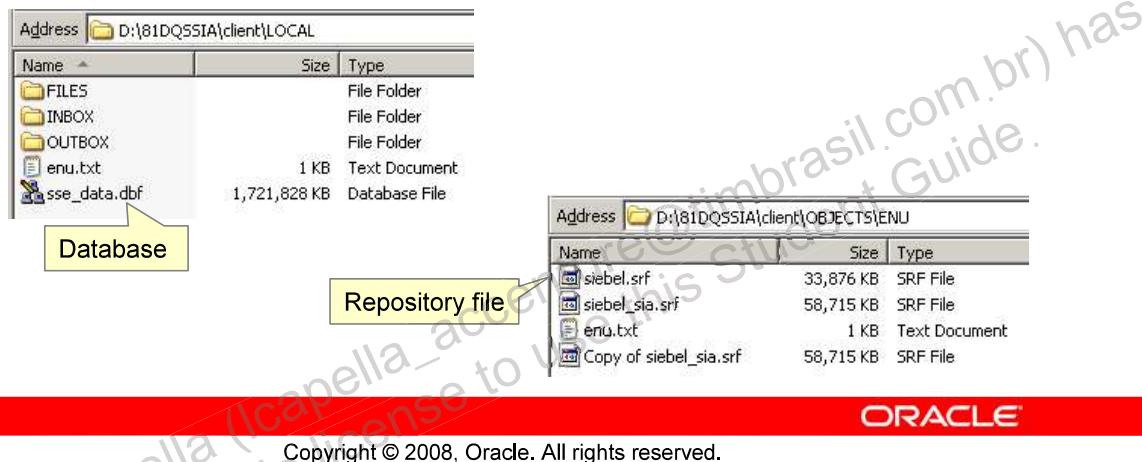


Source Code Control Integration

Reference: "Customizing Your Siebel Tools Environment" in *Using Siebel Tools*

Backing Up

- The local developer can back up work by copying the local database file (.dbf) and the Siebel repository file (.srf)
 - Make sure the files are properly closed
 - Use the operating system's file copy
- Backup before starting configuration and at milestones so that changes can be rolled back if required



Backing Up

You can roll back to a known previous configuration by replacing the current local database file and the .srf file with the corresponding backup files. Make sure that the files were backed up at the same time.

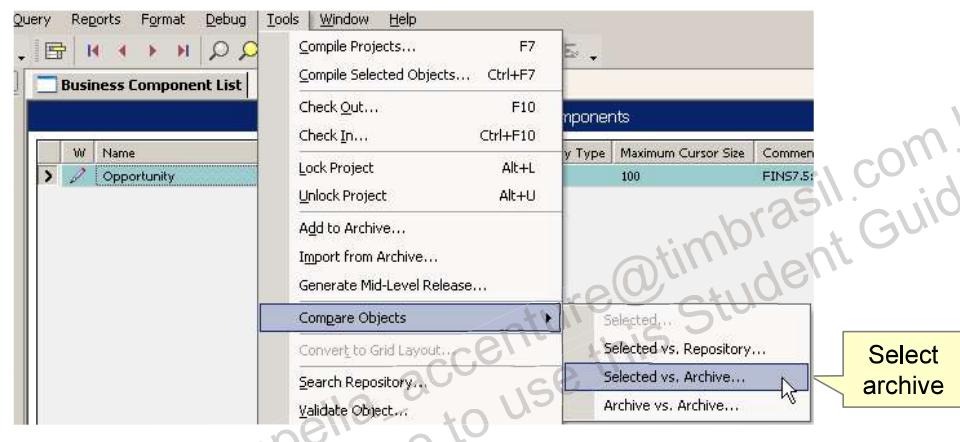
In addition you can roll back the configuration of specific object definitions by importing archive files with prior versions of the object definitions. You will need to compile the archived object definitions.

Comparing Object Definitions

- Displays differences between the selected object definition and another one:
 - In the current local repository
 - In an archive file
 - In the repository on the server
- Allows developers to identify and resolve differences while comparing objects
 - Delete individual child object definitions
 - Copy individual child object definitions in either direction

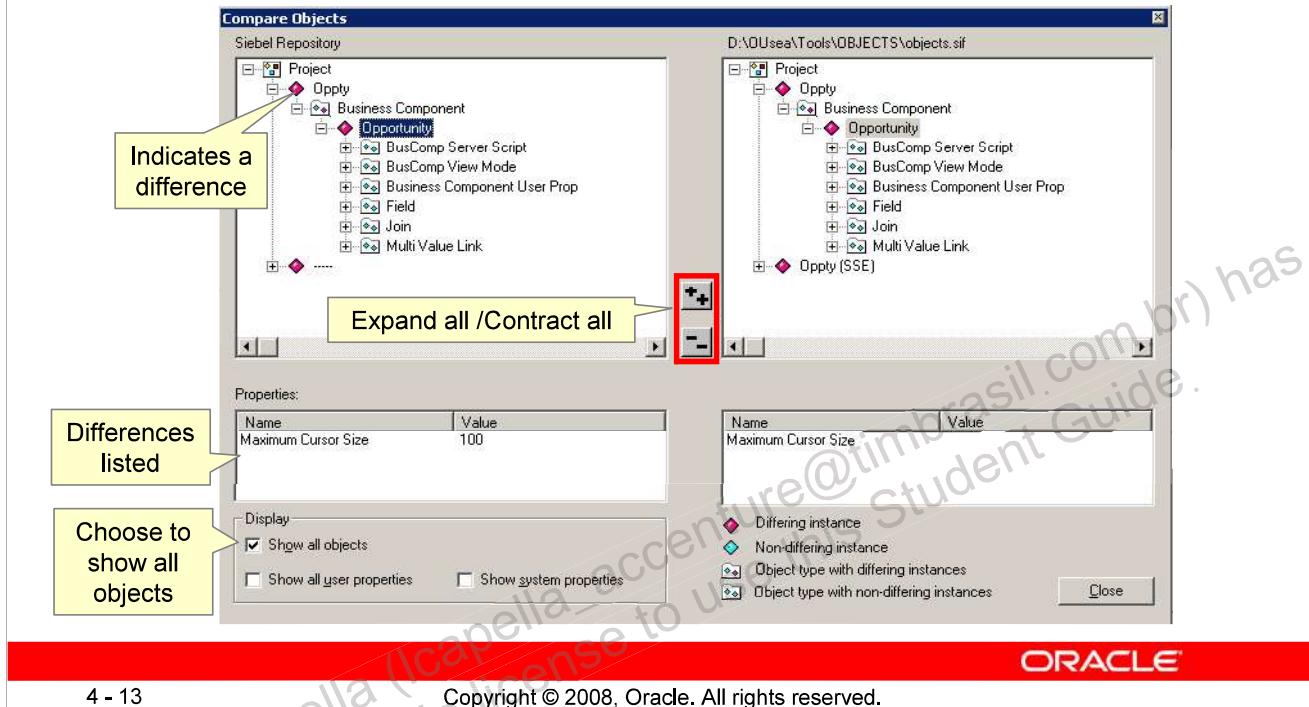
Compare Objects

- To compare a selected object definition to one in an archive or repository:
 - Select Tools > Compare Objects
 - Select the type of comparison
 - Specify the archive or repository



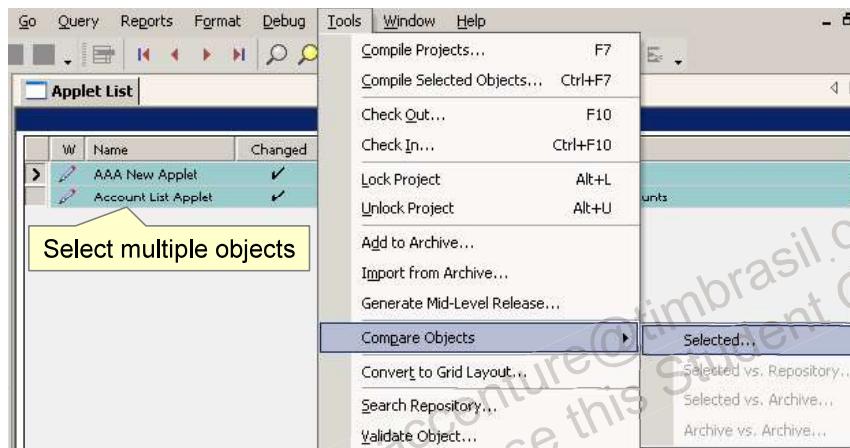
Inspect Differences

- Examine the differences in the Compare Objects window



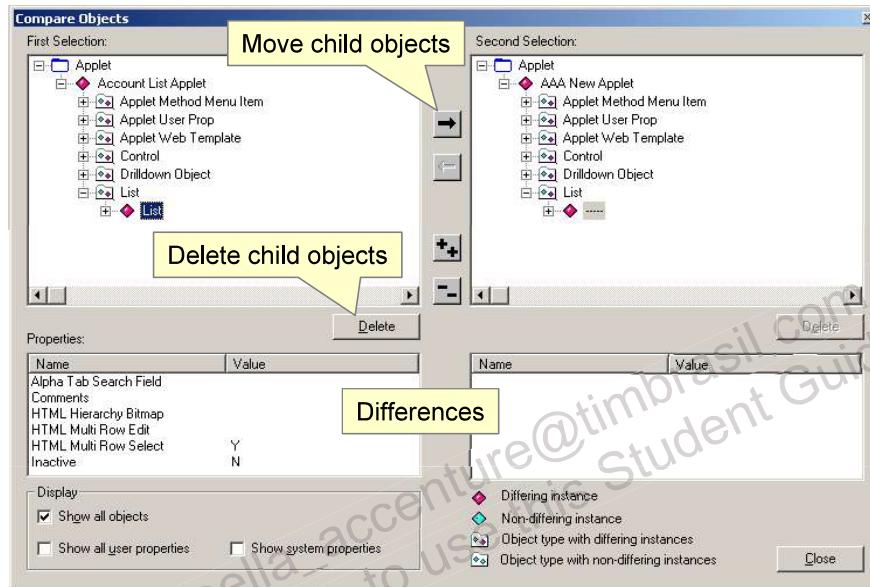
Compare Two Object Definitions

- To compare two object definitions in the active repository
 - Shift-click or control-click to select definitions
 - Select Compare Objects > Selected



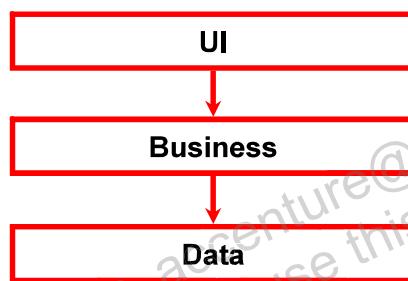
Inspect Differences

- The Compare Objects window allows modifying the object definitions to synchronize them



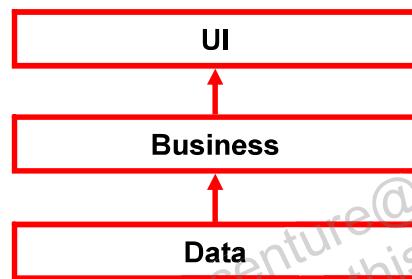
Planning

- Plan your configuration project from the top down:
 - First, determine UI and application functionality
 - Then, determine what changes are necessary at the business layer to implement the UI functionality
 - Finally, determine what changes are necessary at the data layer to implement business layer changes
 - Keep changes to a minimum



Implementing

- Make changes from the bottom up:
 - First, edit data layer definitions, if necessary
 - Then, edit business layer definitions, as required
 - Finally, edit or create the templates and UI layer definitions to display the data correctly



Lesson Highlights

- Developer can generate archives that contain exported definitions
- Archive files can be used to:
 - Share object definitions among developers
 - Back up object definitions
 - Transfer object definitions from one repository to another
- Use Compare Objects to inspect the differences between objects in a repository and/or an archive file

Practice 4 Overview: Editing and Compiling Object Definitions

This practice covers the following topics:

- Generating and importing archive files

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Siebel Web Templates

ORACLE

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Objectives

After completing this lesson you should be able to:

- Describe the role of Siebel Web template files
- List the types of templates
- Describe the role of assigning view and applet items to placeholders in the Web templates

Siebel Web Template Files

- Are HTML files that specify how to render views for a Siebel application in the user's browser
- Specify the formatting and physical layout of:
 - Graphic and text elements
 - User data
- Consist of standard HTML tags and Siebel-specific `swe:` tags

```
<table width="100%" class="banner" cellpadding='0'  
       cellspacing='0' border='0'>  
  <tr>  
    <td></td>  
    <td><swe:menu type="Default" width="275" height="29"  
      bgcolor="#ccccff" fgcolor="#000000" /></td>
```

Standard
HTML tag

Siebel tag

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Siebel Web Template Files

Reference: “Overview of Web Templates and Siebel Tags” in *Configuring Siebel Business Applications*

Siebel Tags

- Are Siebel-defined tags that retrieve object definitions from the repository and convert them to HTML
 - Are processed by the Siebel Web Engine at run time
- Serve as placeholders for Siebel-specific content

```
<swe:for-each-screen> Siebel tag to iterate over all screens
  <swe:screenlink state="Active"><td id="swe:this.Id" .....
  
    <swe:this property= FormattedHtml ">&nbsp;<swe:screenname/>
  &nbsp;</swe:this></td>
    </swe:screenlink>
  ...
</swe:for-each-screen>
```

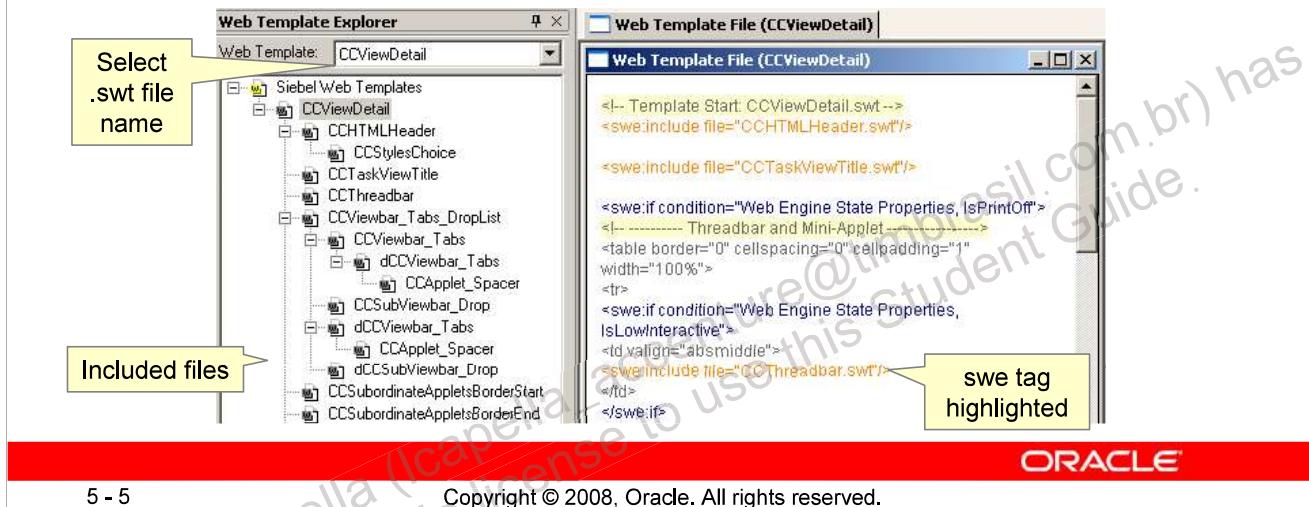
Siebel tag to insert
the name of the
screen

Siebel Tags

This is a fragment from the CCScreenbar_Tabs.swt template file. The fragment has been reformatted slightly for clarity.

Web Template Explorer

- Is a window in Siebel Tools used to:
 - Examine the contents of a template file
 - Identify other template files included in the template file
 - Invoke an editor to modify the template file
- Select View > Windows > Web Templates Window



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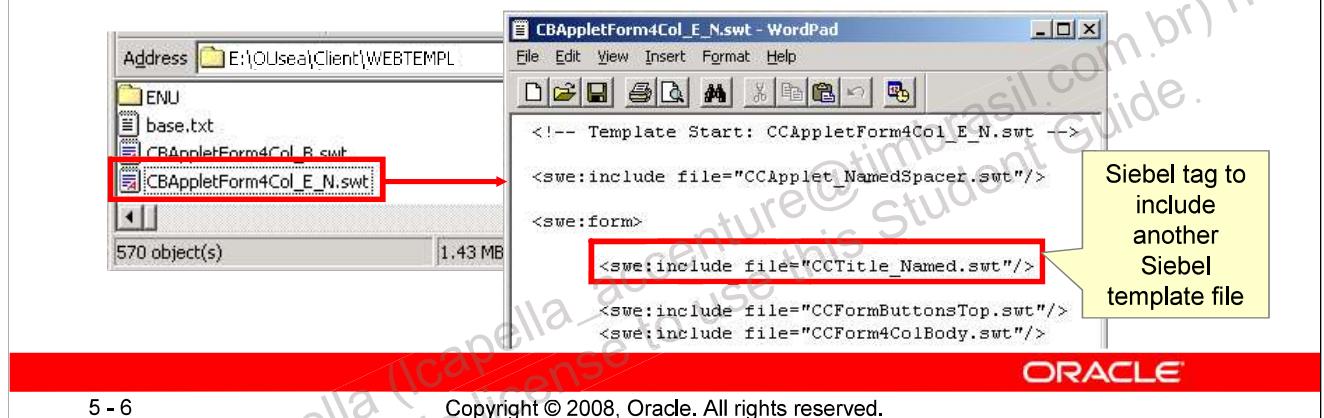
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Web Template Explorer

Reference: "About the Siebel Tools User Interface" in *Using Siebel Tools*

Siebel Web Template Files

- Are stored as separate files outside the Siebel repository
 - Located in the WEBTEMPL directory in a Siebel installation
 - Have an .swt extension
- Can include other template files via swe:include file tag
- Can reference Cascading Style Sheet files (.css)
- Are edited using a text or HTML editor of your choice



Cascading Style Sheets (.css files)

- Are located in either the WEBMASTER\files\ENU or the PUBLIC\enu\FILES directory for a Siebel installation
- Can be changed to modify fonts, colors, and so forth
 - Backup the current .css files
 - Edit .css files with your preferred HTML editor

From main.css

```
/*globalMenu Definitions*/
/*
TR.globalMenu, TD.globalMenu,
TD.globalMenu A,
TD.globalMenu A:visited,
TD.globalMenu A:hover
{
    font-size: 8pt;
    color:#000000;
    background-color: #ccccff;
    font-weight:normal; }
```

Adjust fonts

Adjust colors

Cascading Style Sheet Files (.css files)

These files are located in:

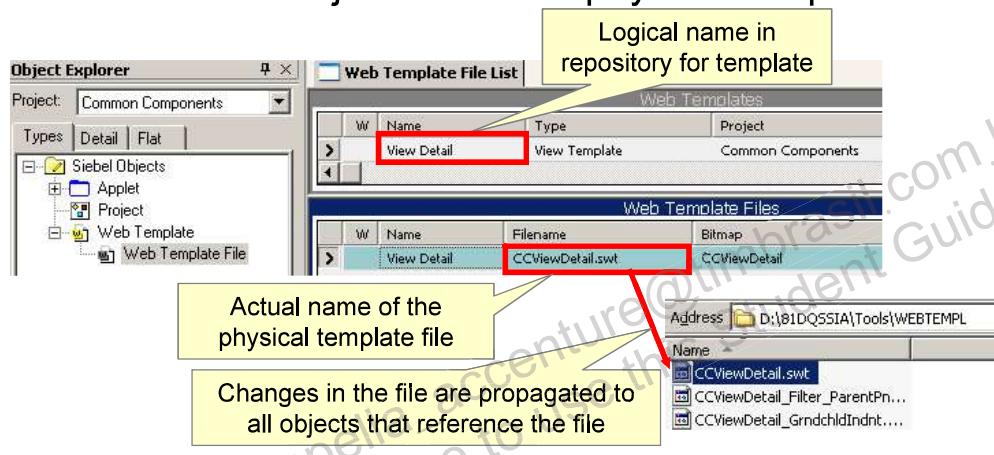
- The Siebel Server installation directory [siebsrvr_root]\WEBMASTER\files\[language_code]
- The Mobile or Dedicated Web Client installation directory [client_root]\PUBLIC\[language_code]\FILES
- The Tools installation directory [tools_root]\PUBLIC\[language_code]\FILES

Using Web Template Files

- Developers use Web template files when configuring UI objects such as applets, views, and so forth
 - Templates specify the layout of various elements
- In most cases developers do not need to create or edit existing Web template files
 - A large variety of template files are delivered as part of a Siebel CRM application

Web Template Object Definition

- Specifies a logical name in the Siebel repository for the physical Web template file
 - All UI object definitions reference Web Template object definitions
- Isolates the UI objects from the physical template files



Web Template Object Definition

The process of creating a Web Template object definition for a physical Web template file is sometimes referred to as *registering* the template file.

Types of Web Templates

- Form Applet Web Templates
- List Applet Web Templates
- View Web Templates
- Web Page Web Templates



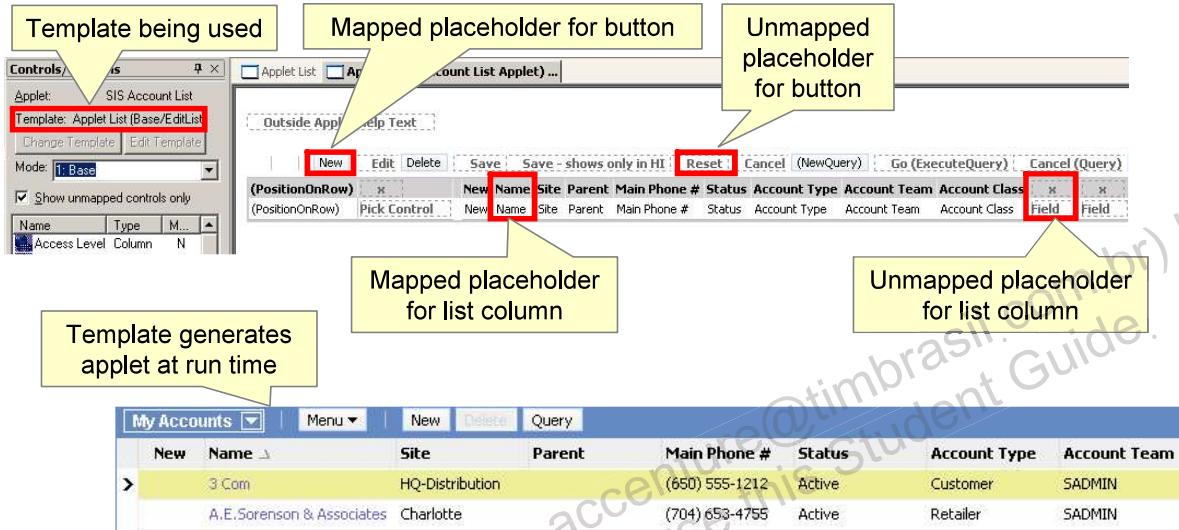
Form Applet Web Templates

- Specify the layout of form applets
 - Determine the position of buttons, data, and captions

The screenshot shows the Siebel Applet Web Template Editor interface. On the left, a sidebar titled 'Controls' lists various controls with their names and types. A specific control, 'MimoAdd' (Type: MiniB...), is highlighted with a red box and labeled 'Template being used'. In the main workspace, a form layout is being defined. A placeholder 'Order #' is highlighted with a red box and labeled 'Mapped placeholder for field'. Another placeholder '(Label)' is also highlighted with a red box and labeled 'Unmapped placeholder for field'. The layout includes sections for 'Add', 'DrillDown Title', 'Label', 'Type', 'Account', 'Last Name', and 'Price List'. Buttons like '(ButtonMaximizeApplet)', '(ButtonMinimizeApplet)', and '(ButtonMoveAppletUp)' are also present. A placeholder '(Inside Applet Help Text)' is labeled 'Template generates applet at run time'. The top right corner of the workspace has a placeholder '(Title)' labeled 'Mapped placeholder for applet title'. The bottom right corner has a placeholder '(Close)' labeled 'Mapped placeholder for button to collapse applet'. A red dashed box encloses the entire form layout area.

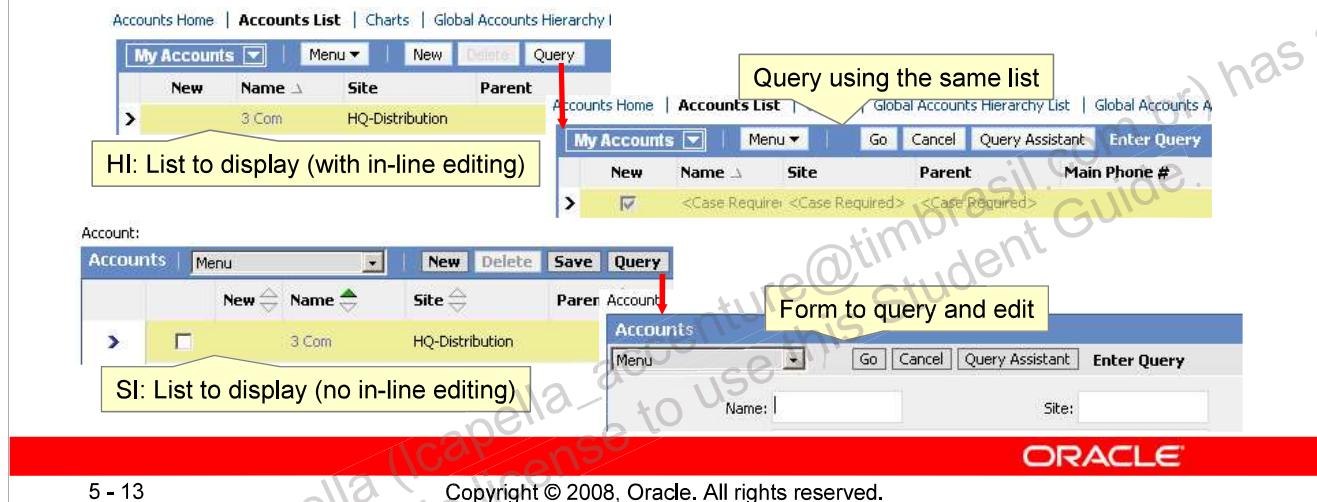
List Applet Web Templates

- Specify the layout of list applets
 - Determine the position of buttons and list column sequence



Applet Web Templates

- Support the display of list applets in multiple modes for:
 - High interactivity (HI) clients: use Edit List mode
 - Standard interactivity (SI) clients: use Base and Edit modes
 - Base: displays list of read-only records
 - Edit: displays a selected record in a form



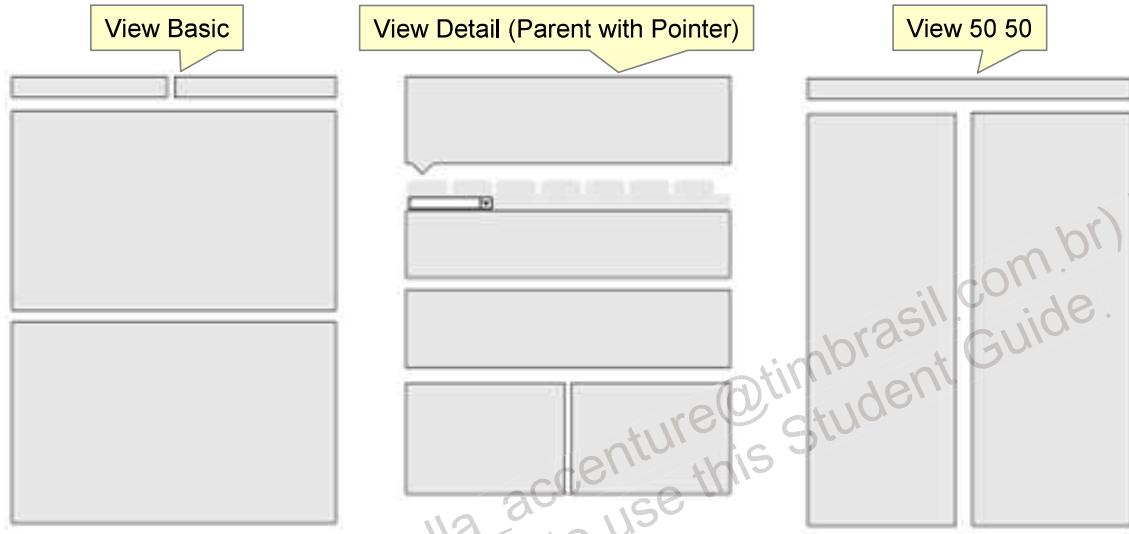
Applet Web Templates

High Interactivity mode uses Active-X controls and Java to provide extra functionality such as drag-and-drop operations, and to support page refreshes. This mode requires specific versions of Internet Explorer.

Standard Interactivity mode is designed to be less browser dependent and resembles typical Web-based applications. It does not support all the high interactivity operations. This mode is supported on a wider variety of browsers including several non-IE browsers.

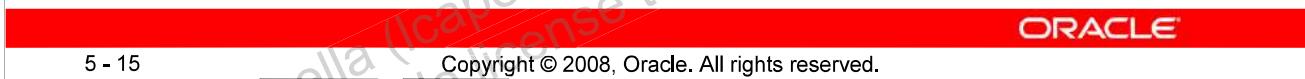
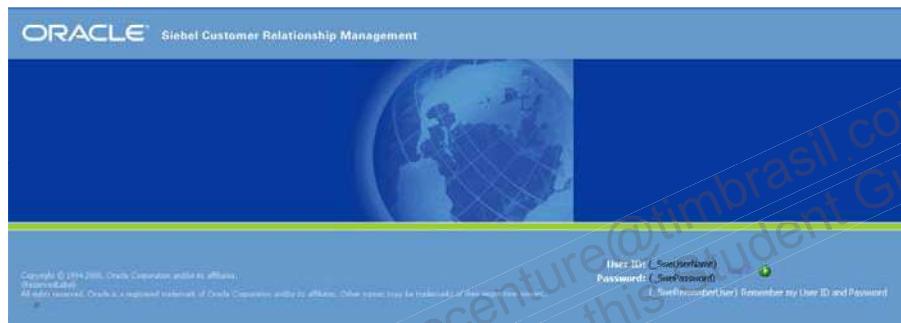
View Web Templates

- Define the layout of a view
 - Common view templates include:



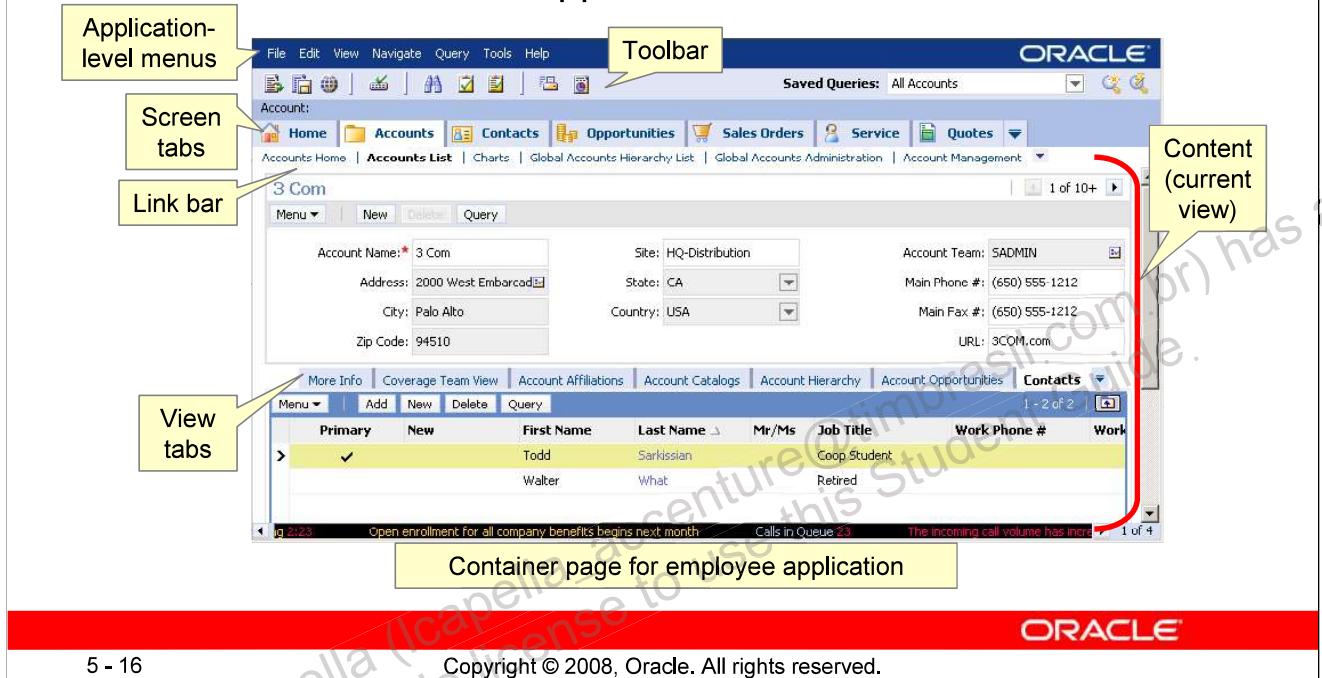
Web Page Web Templates

- Define the layout of UI elements other than Siebel views and applets
 - Examples:
 - Login Page
 - Error Page
 - Container Page



Container Page

- Is a Web page that renders the UI elements that surround the view in a Siebel application



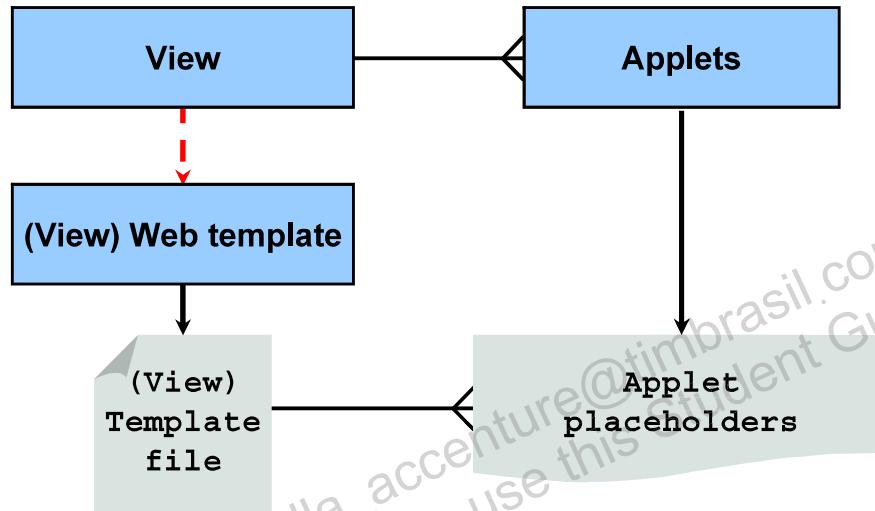
Working with Web Templates

- Developers perform the following two major activities when creating and editing UI objects
 - Assign a Web template to the UI object
 - Assign the components of a view or applet to the placeholders in a Web template



Assigning a Web Template to a View

- Identifies the Web Template object definition used to render the view, applet, or Web page

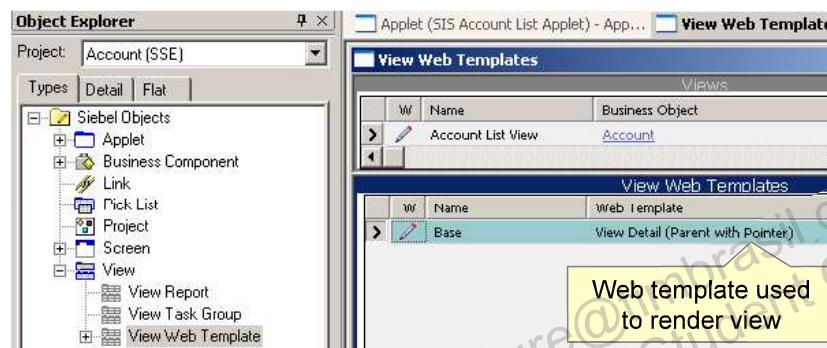


Assigning a Web Template to a View

The process of assigning a Web Template object definition to a view or applet is sometimes referred to as *associating*.

Example: Assigning a Web Template to a View

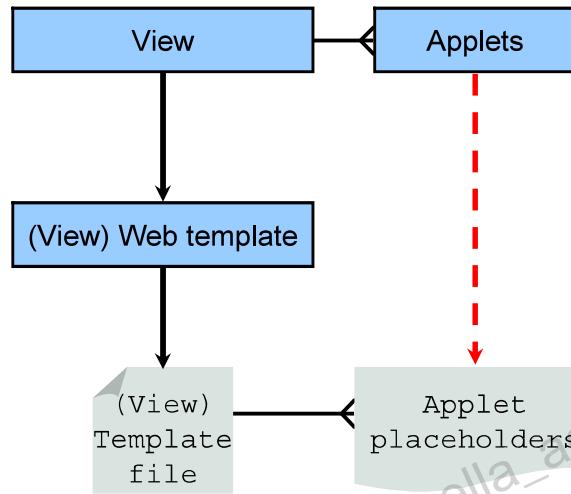
- Developers select and assign a view Web template
 - Typically occurs when using the new view wizard
 - Can also be performed by directly editing the view object



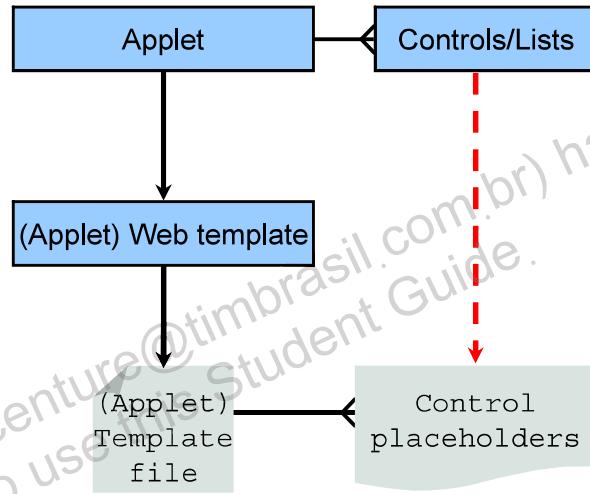
Assigning Components in a View or Applet

- Maps the components of an applet or view to placeholders in the corresponding template file

Mapping Applets to Views



Mapping Controls to Applets



Assigning Components in a View or Applet

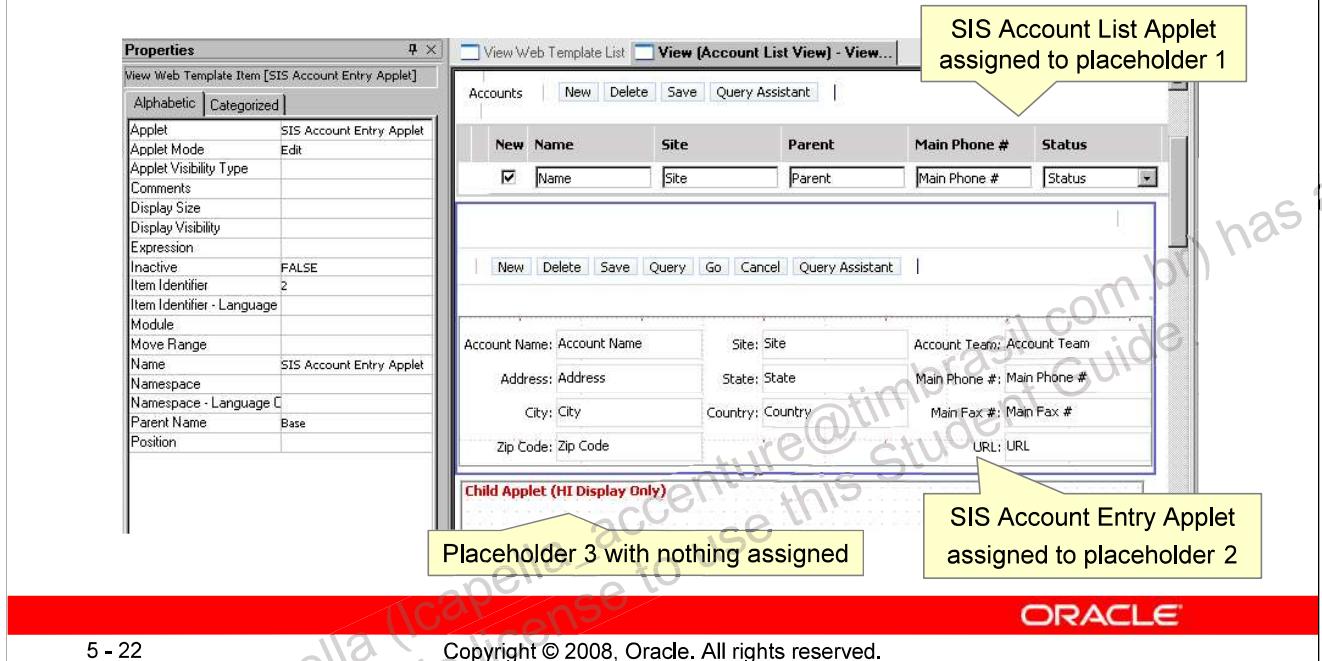
The process of mapping components of a view or applet to placeholders in the Web template is sometimes referred to as *binding*.

Mapping Information

- Is specified in the repository with these object definitions
 - View Web Template Item
 - Applet Web Template Item
 - Web Page Item
- Results in the corresponding element being displayed at run time

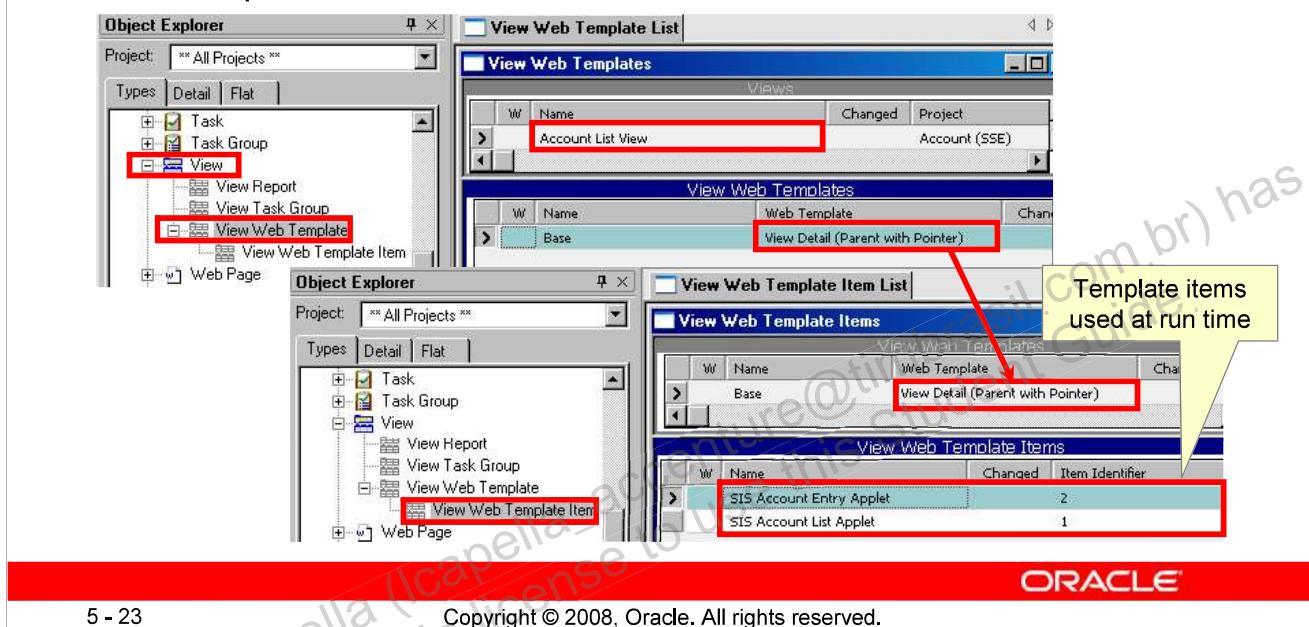
Example: Assigning Applets in a View

- Developers use the view Web Layout Editor to assign applets in a view to the placeholders in the view template

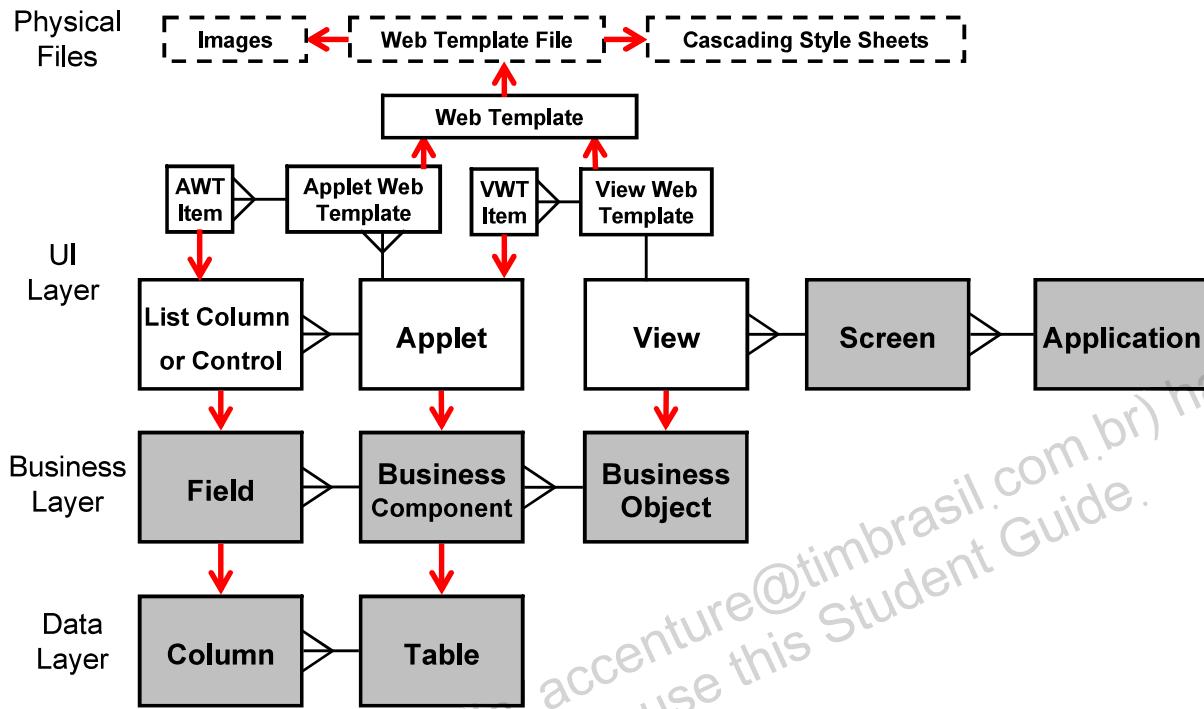


View Web Template Items

- The editor creates the view Web template items
 - Are used at run time to render the applets in the desired position in the view



Summary of Object Types



Lesson Highlights

- Siebel Web Template Files are HTML files that specify how to render views for a Siebel application in a user's browser
 - Can include other template files
 - Can reference .css files
- Siebel tags are a Siebel-developed library of tags in Web template files processed at run time
- The four Web Template types are Form Applet, List Applet, View, and Web Page
- Developers assign a Web template when creating new UI objects
- Developers map components of an applet or view to specify where the components appear in the applet or view

Practice 5 Overview: Siebel Web Templates

This practice covers the following topics:

- Examining Web Templates

Configuring Form Applets

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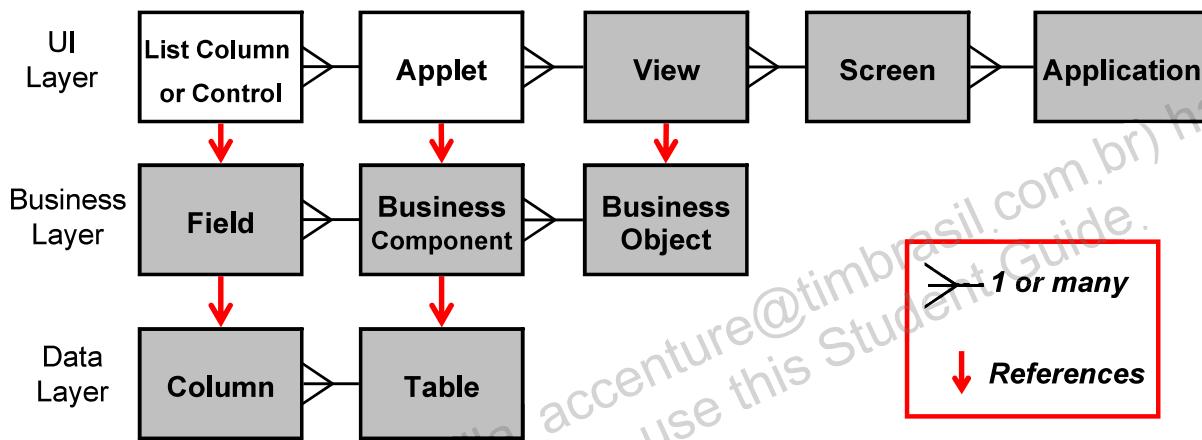
Objectives

After completing this module you should be able to:

- Identify the object types used to configure a form applet
- Edit an existing form applet
- Create a new form applet

Applet

- Consists of list columns or controls
- References a business component that provides the data displayed in the applet
- Has an assigned applet Web template



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Common Applet Types

- List applets that display multiple records in rows
- Form applets that display a single record in a grid or form
 - Shows more fields than displayed in a list applet

The screenshot shows a Siebel application interface. At the top, there is a navigation bar with links: Home, Accounts, Contacts, Opportunities, Sales Orders, Service, Quotes, and Account Management. Below the navigation bar, the title 'A.E.Sorenson & Associates' is displayed. A toolbar below the title includes 'Menu', 'New', 'Delete', and 'Query'. The main area is divided into two sections. The top section, labeled 'Form applet' with a yellow callout, displays a single record for 'A.E.Sorenson & Associates' with fields for Account Name, Address, City, Zip Code, Site, State, Country, Account Team, Main Phone #, Main Fax #, and URL. The bottom section, labeled 'List applet' with a yellow callout, displays a grid of contacts. The grid has columns for Primary, New, First Name, Last Name, Mr/Ms, Job Title, Work Phone #, and Work Fax #. The data in the grid is as follows:

Primary	New	First Name	Last Name	Mr/Ms	Job Title	Work Phone #	Work Fax #
>	✓	Usha Kiran	Guddanti	Mrs.	Consultant	(650) 318-0090	(650) 318-0090
		Jennine	Morgan	Ms.	Vice President	(704) 844-8260	(704) 844-7567
		Veronica	Shellmond	Ms.	Senior Associate	(704) 844-8243	(704) 844-7567
		Jack	Smith	Mr.	CEO	(704) 844-8343	(704) 844-8888
		Bradley	Sorenson	Mr.	Vice President	(704) 844-8239	(704) 844-7567
		Sherry	Trumble	Ms.	Research Analyst	(704) 844-8000	(704) 844-7567

Applet Properties

- Business Component: specifies the underlying business component whose data is displayed in the applet
- Title: specifies the text for the applet title
- Class: Determines the behavior of the applet
 - Specifies the C++ class used at run time for the applet
 - Should never be changed for as-delivered applets
 - Specialized classes provide applet-specific behavior



Applets			
Name	Business Component	Title	Class
Account Entry Applet	Account	Account	CSSFrameBase
Account Form Applet	Account	Account	CSSFrameBase
Account List Applet	Accounts	Accounts	CSSFrameListBase

Editing Properties

- Can be set to either:
 - TRUE: disallows the editing operation in the applet even if it is allowed in the underlying business component
 - FALSE: permits the editing operation if it is allowed in the underlying business component
- Can be set to specialize multiple copies of applets for use in different views



Controls for Form Applets

- Form applets:
 - Display one record at a time in a data entry form layout
 - Consist of several types of controls
 - Field controls display fields in the business component
 - Field Caption property displays as the caption text
 - Button controls initiate an action when clicked

The screenshot shows a Siebel Form Applet for an account record. The top navigation bar includes Home, Accounts, Contacts, Opportunities, Sales Orders, Service, and Query. Below the navigation is a toolbar with Menu, New, Delete, and Query buttons. The main area displays account details in a grid format. Labels indicate the types of controls:

- Caption:** Points to the "Account Name:" label.
- Field control:** Points to the "Address:" field.
- Button control:** Points to the "New" button in the toolbar.

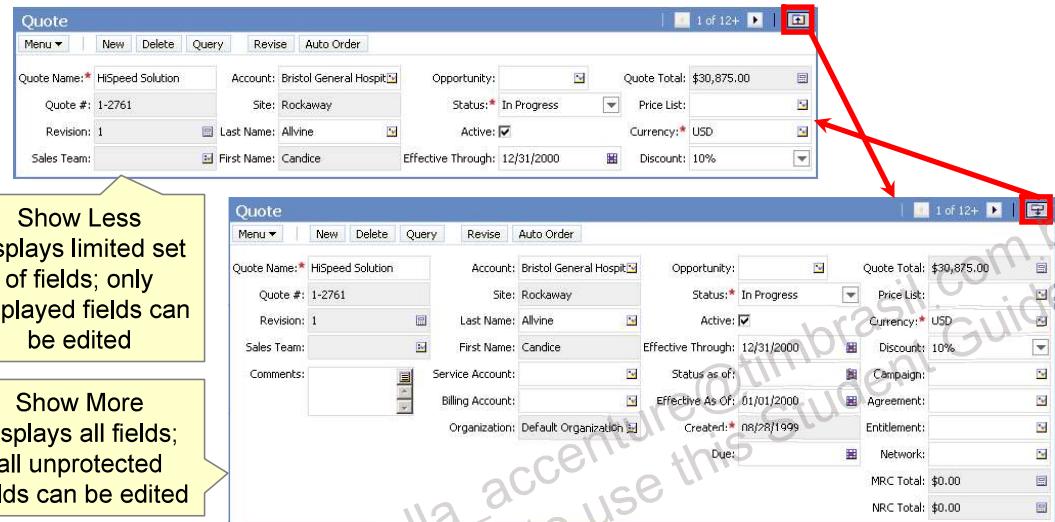
A yellow callout box in the top right corner states "Supports scrolling of records". A red box highlights the page number "2 of 10+" in the bottom right corner. The bottom of the screen features a red footer bar with the ORACLE logo and copyright information: "Copyright © 2008, Oracle. All rights reserved."

Controls for Form Applets

Reference: “Configuring Applets” in *Configuring Siebel Business Applications*

Expanding and Collapsing Form Applets

- Some form applets can be toggled between a collapsed and an expanded display
 - Use the Show More/Show Less buttons to toggle the applet



Control Object Definitions

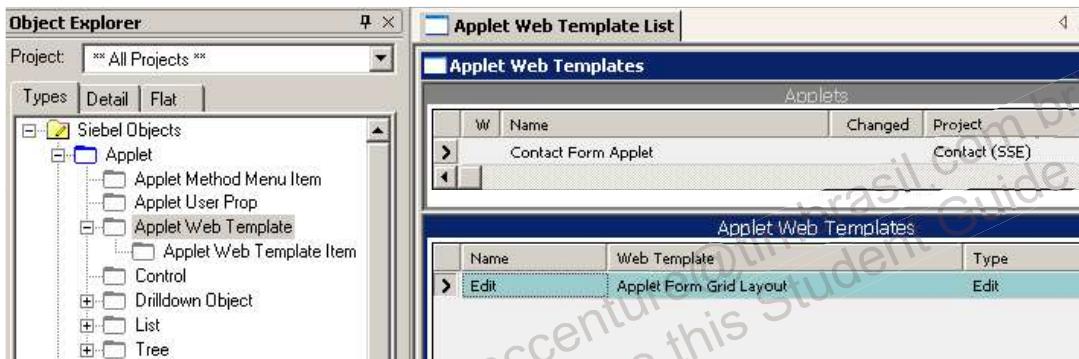
- Are child object definitions of applets that identify the controls that can appear in the form applet
 - Specifies the field to display from the underlying business component
 - Specifies the button controls

The screenshot shows the Siebel Object Explorer interface. On the left, the Object Explorer tree view is open under 'Siebel Objects' > 'Applet'. The 'Control' node is selected. In the center, the 'Control List' window displays a table of controls for the 'Contact Form Applet'. The table has columns for Name, Field, Caption, and HTML Type. The data includes fields like 'ExecuteQuery', 'Fax Phone # - Auto', 'Fax Phone Num - Long', 'FaxPhoneNum', 'FinsSalesRep', 'First Name - Auto', 'First Name - Long', and 'FirstName', each with specific captions and HTML types such as 'MinButtonQuery', 'Field', and 'Text'.

Name	Field	Caption	HTML Type
ExecuteQuery		Go	MinButtonQuery
Fax Phone # - Auto	Fax Phone #	Main Fax #	Field
Fax Phone Num - Long	Fax Phone #	Main Fax #	Field
FaxPhoneNum	Fax Phone #	Main Fax #	Field
FinsSalesRep	Sales Rep	Coverage Team	Field
First Name - Auto	First Name	First Name	Field
First Name - Long	First Name	First Name	Field
FirstName	First Name	First Name	Field

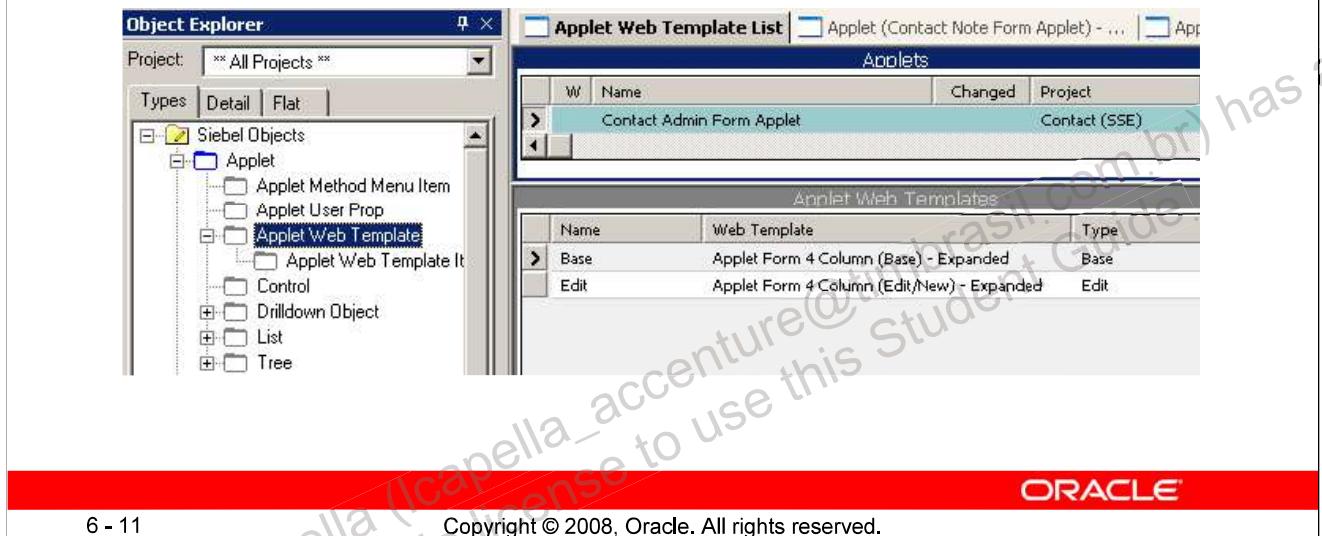
Web Templates for Form Applets

- Most form applets use the Applet Form Grid Layout template
 - Allows fields and captions to be positioned anywhere in the applet
 - Usually involves only an Edit mode for the applet



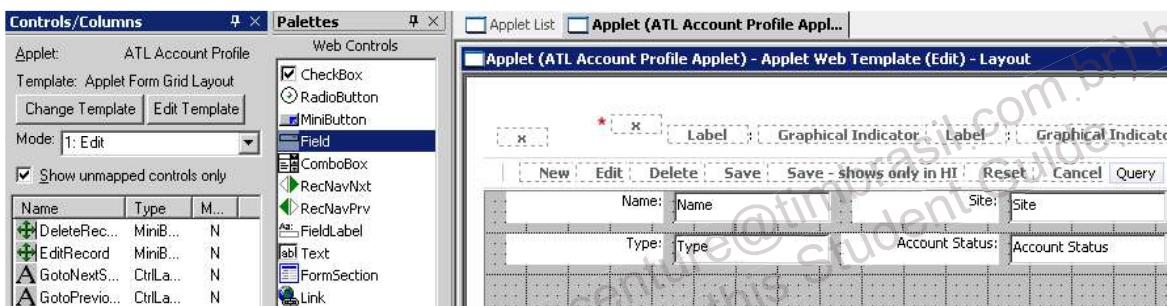
Web Templates for Form Applets

- Some form applets use regular form applet Web templates
 - Fields can be assigned only to pre-positioned place holders
 - May involve several applet modes



Grid Layout Editor

- Is used to edit form applets that use the Applet Form Grid Layout template
 - To invoke right-click the applet and select Edit Web Layout
 - Modify the applet by:
 - Deleting or adding new controls to the applet
 - Resizing or repositioning controls

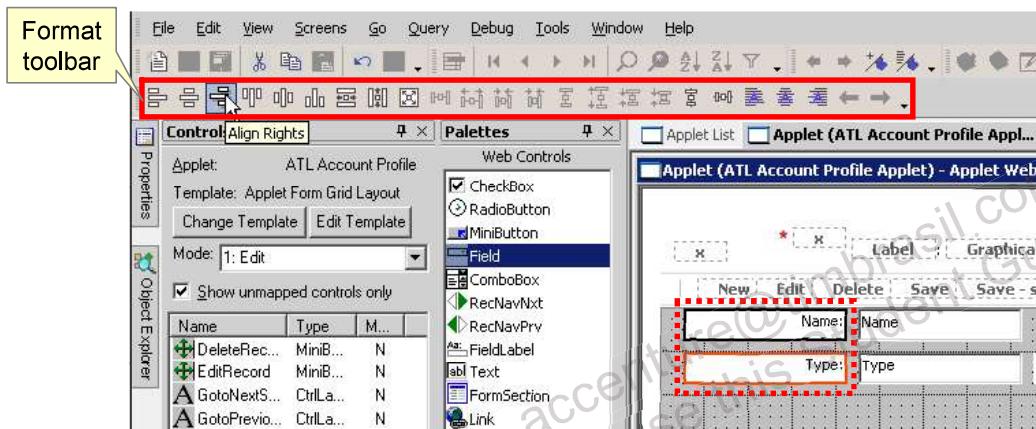


Grid Layout Editor

Reference: “Editing Applet Layout” in *Configuring Siebel Business Applications*

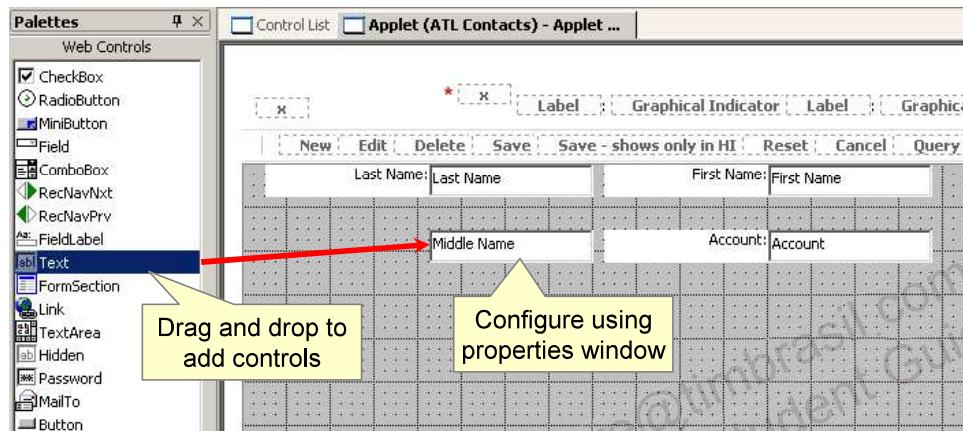
Grid Layout Editor: Additional Operations

- Supports drag-and-drop editing
- Supports multiple formatting and alignment options to assist with control placement
 - Access commands in the Format toolbar



Web Controls Palette

- Can be used for drag-and-drop creation of controls
 - Configure the control using the properties window



Creating a Form Applet

- Use the Form Applet wizard to create a new form applet



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Creating a Form Applet

It is good practice to append a project-specific prefix (such as AAA) to all object definitions that you create. This allows you to easily distinguish your newly created objects from those delivered in the Siebel repository.

Form Applet Wizard Inputs

- Project to contain the new applet
- Name and display title for the form applet
- Business component for the applet
- The upgrade behavior
 - Can be Admin, Non-preserved, Preserved
- The Web templates that will be used for each mode
 - Edit mode is required for all clients
 - Uses the Applet Form Grid Layout template
 - Base mode is required for Standard Interactivity clients only
- The business component fields available to be mapped
- Additional controls that will be added to the applet
 - By default, all of the standard buttons are selected

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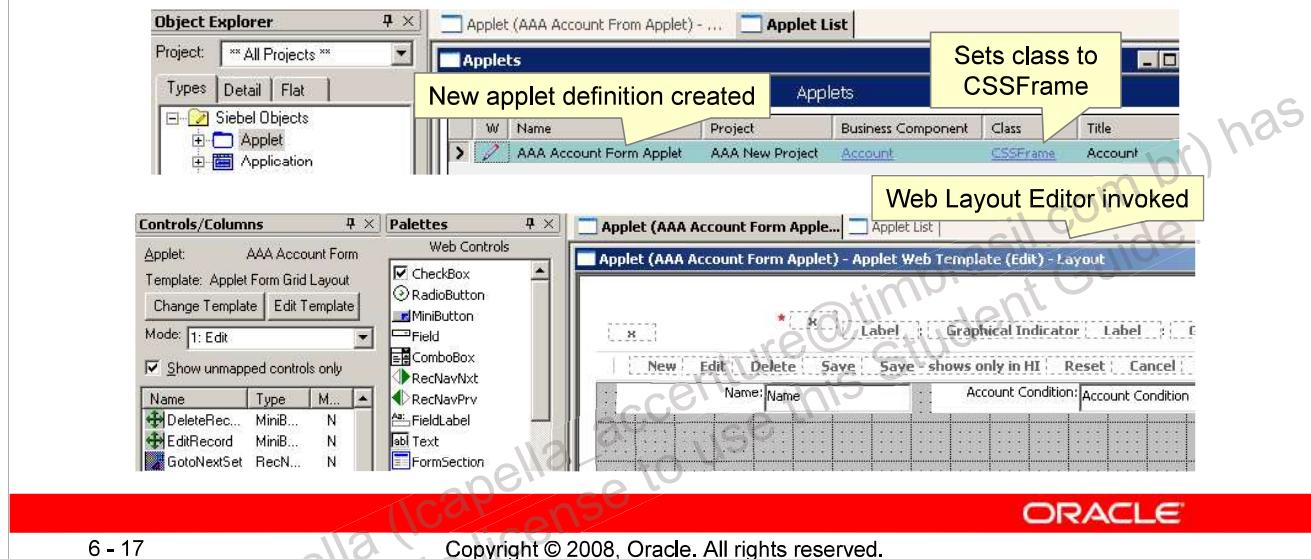
Form Applet Wizard Inputs

New object wizards typically require entering a name and project. The name must be unique for the object type. The project must already exist and be locked.

Many of the UI wizards also require entering the Upgrade Property. The Upgrade Behavior property determines whether a specific UI object definition can be upgraded using the Incorporate Custom Layout option. This option is relevant only for as-delivered object definitions, and consequently the value of the Upgrade Behavior property is ignored for all custom objects created by users.

Form Applet Wizard

- Creates an applet object definition including controls, applet web template, and applet web template items
- Invokes the Web Layout editor
 - Grid layout editor for Applet Form Grid Layout template



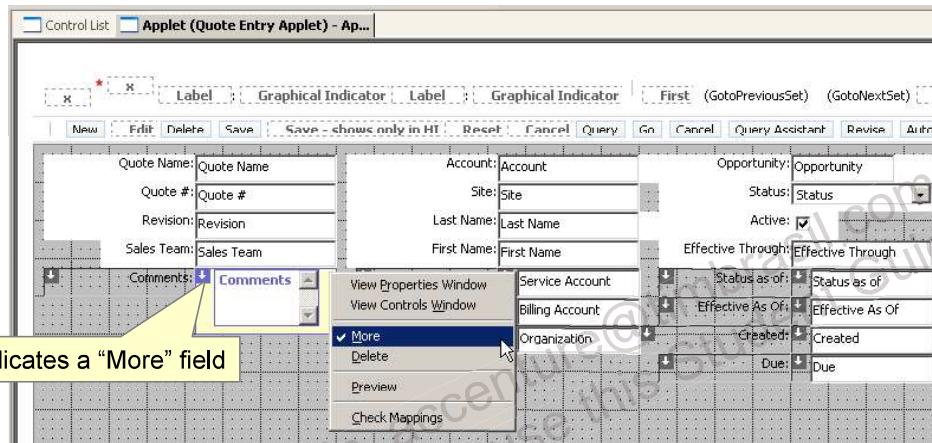
Grid Layout Editor

- Use the Grid Layout editor to:
 - Add desired button controls
 - Reposition, add, or delete field controls
- Right-click and select Preview to see how the applet appears
 - When finished, right-click and deselect Preview to return to the Grid Layout Editor



Show More Mode

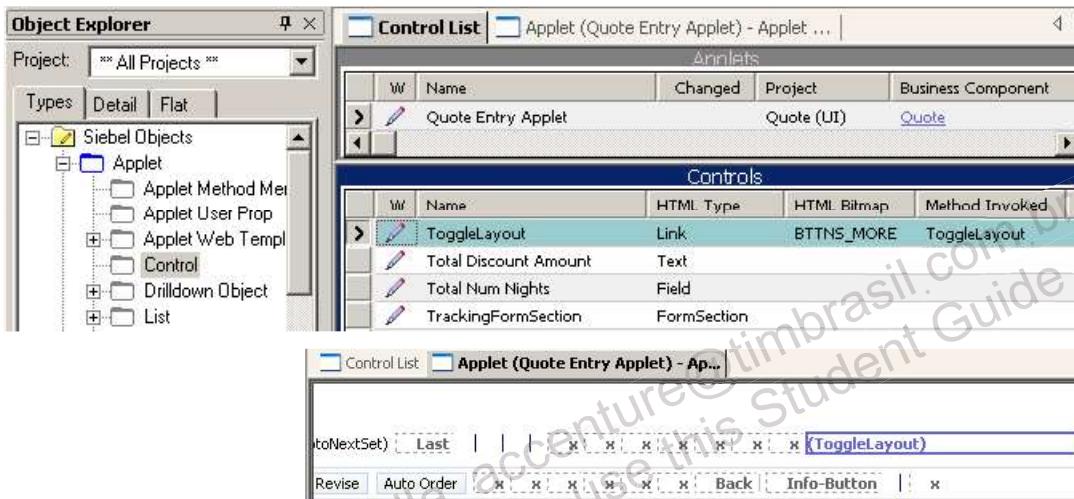
- To have a field display only when the applet is expanded
 - Select the control in the Web layout editor
 - Right-click and select More
 - An arrow indicates the control is set for display in More mode



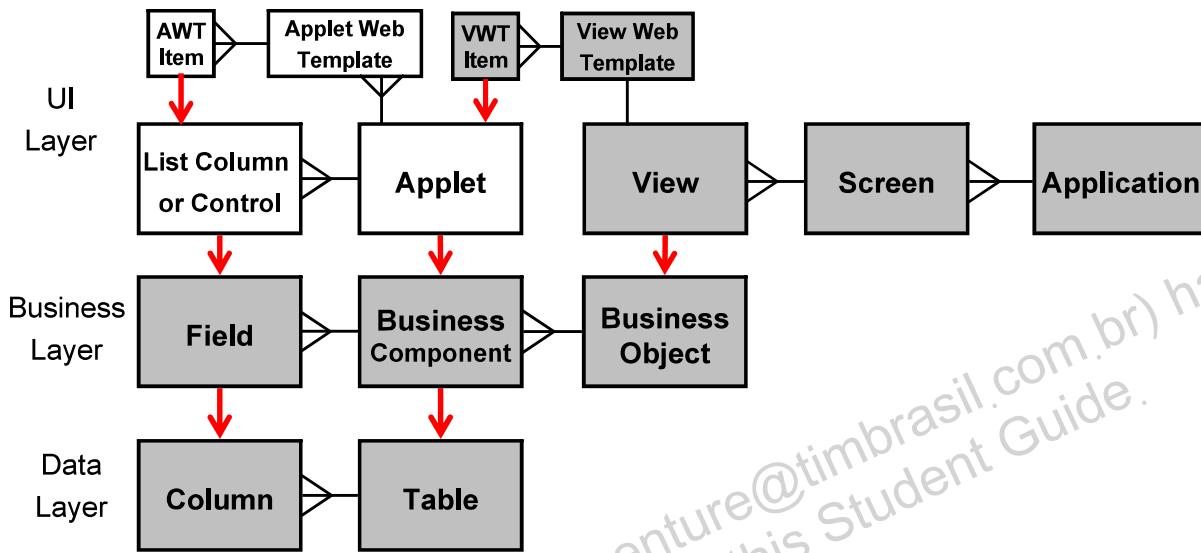
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Enabling Show More

- To enable expanding and collapsing the form applet:
 - Create a ToggleLayout control
 - Add it to the template using the Web Layout Editor



Summary of Object Types



Lesson Highlights

- Form applets display a single record and contain fields for the record in a grid
 - Consist of multiple child controls
- Most form applets use the Applet Form Grid Layout template
- The Grid Layout editor is used to add, remove, and reposition field controls
 - Includes functionality to align and position controls
- Use the form applet wizard to create a new form applet

Practice 6 Overview: Configuring Form Applets

This practice covers the following topics:

- Examining an existing form applet
- Creating a form applet using the Grid Layout Editor

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Configuring List Applets

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Objectives

After completing this module you should be able to:

- Identify the key object types used to configure a list applet
- Edit an existing list applet
- Create a new list applet

List Applets

- Display multiple records simultaneously in a list
 - Fields for a record are displayed in a single row
- Display a small set of fields for each record
- Support drilldown to other views through hyperlinked fields

The screenshot shows a Siebel application window titled "Accounts List". The top navigation bar includes links for Home, Accounts, Contacts, Opportunities, Sales Orders, Service, and Quotes. Below the navigation is a toolbar with buttons for New, Delete, and Query. The main area displays a grid of account records with the following columns: New, Name, Site, Parent, Main Phone #, Status, and Account Type. The grid contains 10+ rows of data, with the first few rows visible. The data includes various companies like 3 Com, A.E. Sorenson & Associates, AG Edwards & Sons, Inc., Aaron-Jones Dry Cleaning, Abbey General Hospital, Abbot Designs, Abbot School for Medicine, Abitibi Consolidated Inc., Abrams Insurance Carriers, and others. The "Status" column shows values like Active and Customer. The "Parent" column indicates some accounts are part of larger entities. The "Site" column shows locations such as HQ-Distribution, Charlotte, San Francisco, and Costa Mesa.

New	Name	Site	Parent	Main Phone #	Status	Account Type
>	3 Com	HQ-Distribution		(650) 555-1212	Active	Customer
	A.E. Sorenson & Associates	Charlotte		(704) 653-4755	Active	Retailer
	AG Edwards & Sons, Inc.	HQ-Distribution	Dynamic Investment Realty Corp.	(212) 489-1500	Active	Commercial
	AG Edwards & Sons, Inc.	San Francisco	AG Edwards & Sons, Inc.	(415) 742-4500	Active	Commercial
	Aaron-Jones Dry Cleaning	San Francisco		(925) 725-3605	Active	Customer
*	Abbey General Hospital	NJ	Premier Healthcare System	(732) 540-5000	Active	Customer
	Abbot Designs	San Francisco		(650) 425-3244	Active	Subcontractor
	Abbot School for Medicine	San Francisco		(987) 098-2675	Active	Subcontractor
	Abitibi Consolidated Inc.			(514) 875-2160	Active	Customer
	Abrams Insurance Carriers	Costa Mesa			Active	Customer

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List Applets

Fields typically displayed in list applets include:

- Fields that identify the record (name/site)
- Fields with hyperlinks
- Fields which are commonly sorted or queried (status)
- Other commonly used fields

List Applets

- List applets include:
 - List columns that display fields for multiple records
 - Button-type controls that initiate an action when clicked

The screenshot shows the Siebel 8.1.x Accounts List applet. At the top, there's a navigation bar with links like Home, Accounts, Contacts, Opportunities, Service, and Quotes. Below the navigation bar is a toolbar with buttons for New, Delete, and Query. A callout bubble points to the 'Button control' button in the toolbar. Another callout bubble points to a column header labeled 'Name' in the list view, which is highlighted with a yellow box and labeled 'List column'. The main area displays a grid of account records with columns for Name, Site, Parent, Main Phone #, Status, and Account Type. The first record in the list is highlighted with a yellow background. The bottom of the screen features a red footer bar with the ORACLE logo and copyright information.

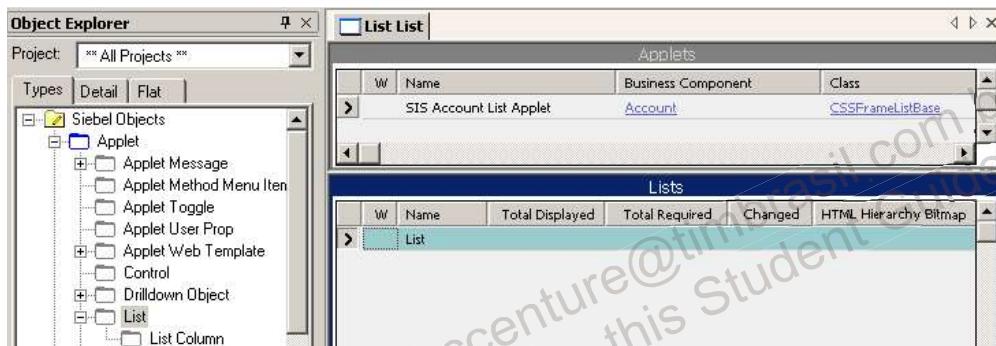
New	Name	Site	Parent	Main Phone #	Status	Account Type
>	3 Com	HQ-Distribution		(650) 555-1212	Active	Customer
	A.E.Sorenson & Associates	Charlotte		(704) 653-4755	Active	Retailer
	AG Edwards & Sons, Inc	HQ-Distribution	Dynamic Investment Realty Corp.	(212) 489-1500	Active	Commercial
	AG Edwards & Sons, Inc	San Francisco	AG Edwards & Sons, Inc	(415) 742-4500	Active	Commercial
	Aaron-Jones Dry Cleaning	San Francisco		(925) 725-3605	Active	Customer
*	Abbey General Hospital	NJ	Premier Healthcare System	(732) 540-5000	Active	Customer
	Abbot Designs	San Francisco		(650) 425-3244	Active	Subcontractor
	Abbot School for Medicine	San Francisco		(987) 098-2675	Active	Subcontractor
	Abitibi Consolidated Inc.			(514) 875-2160	Active	Customer
	Abrams Insurance Carriers	Costa Mesa			Active	Customer

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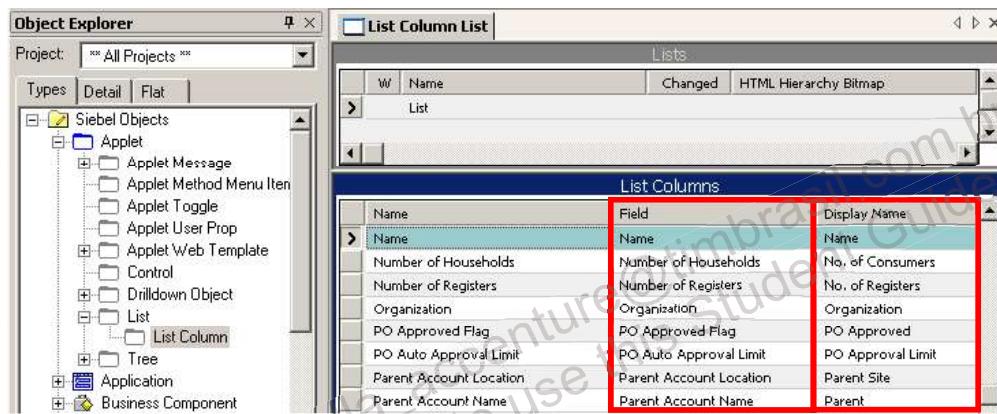
List Object Definition

- All applets are configured using an Applet object definition
- In addition, list applets require a List child object definition
 - Serves as a container for the list columns that are displayed
 - Specifies properties that apply to the set of rows
 - Example: running totals for designated list columns



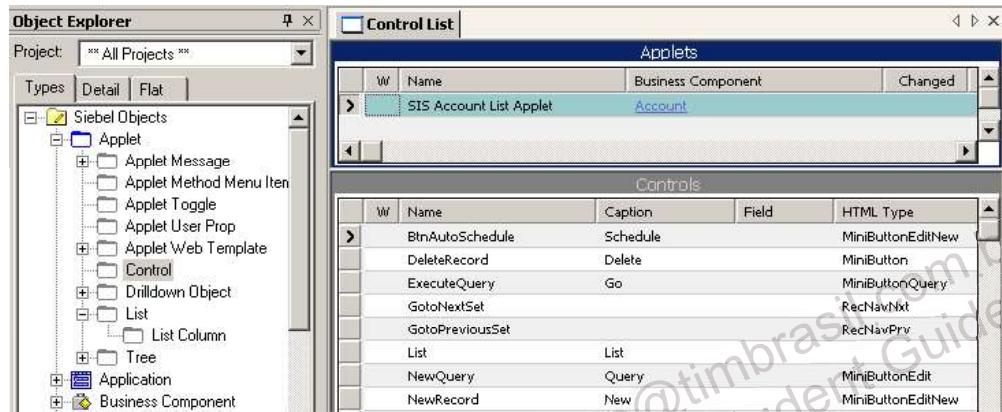
List Column Object Definitions

- List columns identify the columns that can appear in the applet
 - Specifies the field in the underlying business component to display in the list applet
 - Specifies the display name used for the column header



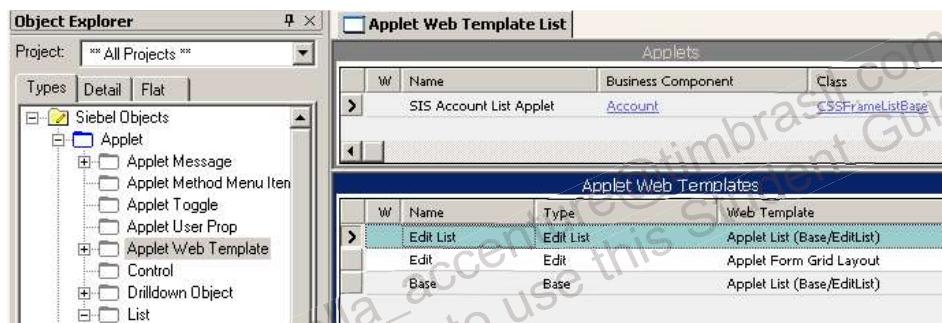
Control Object Definitions

- Controls identify the buttons and other controls that might appear in the list applet



List Applet Web Templates

- List applets can have multiple Web templates to support different applet modes
 - Applet modes refer to ways an applet can be rendered in standard interactivity (SI) and high interactivity (HI) modes
- Choose the template based on the desired applet functionality
 - Look at the template definitions for similar applets



List Applet Modes

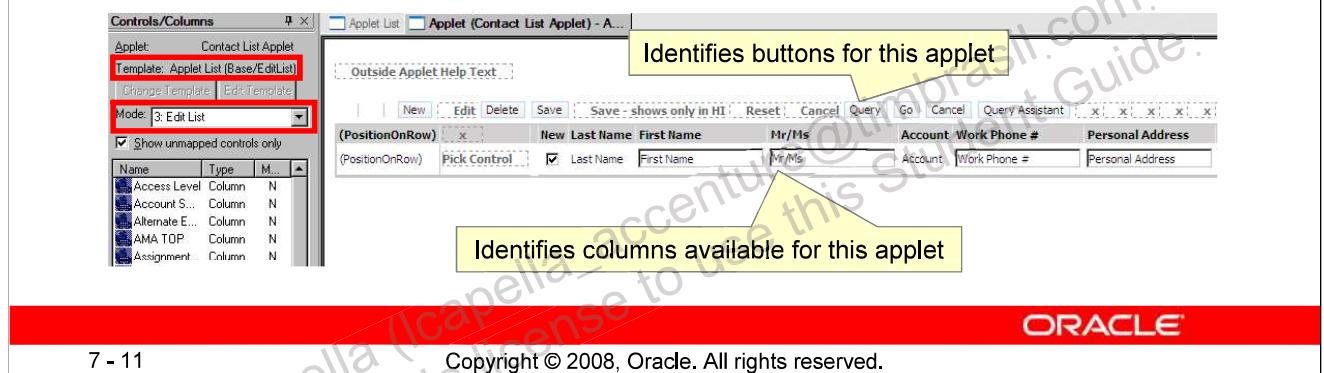
- Edit List:
 - Permits in-line editing in the list applet
 - Is supported only in HI mode
 - Is the designated mode for most list applets in HI mode
- Base:
 - Displays records as a list applet, but does not allow editing
 - Provides buttons or menu items to edit or create a query
 - Invokes the applet with a different template to continue the requested operation
- Edit:
 - Uses a form template to allow users to edit the record or create a query

Base and Edit Modes

- Are typically used:
 - For customer applications
 - For employee applications in standard interactivity mode
- May occasionally be used in high interactivity clients for editing and querying
 - Provides users with a form that displays more fields than can be easily seen in a list applet

Applet Web Layout Editor

- Is used to examine and edit the current layout of the applet
 - To invoke right-click the applet and select Edit Web Layout
 - Select the applet mode to inspect
 - Modify the applet by:
 - Adding and removing columns
 - Reordering columns
 - Adding or removing buttons and controls

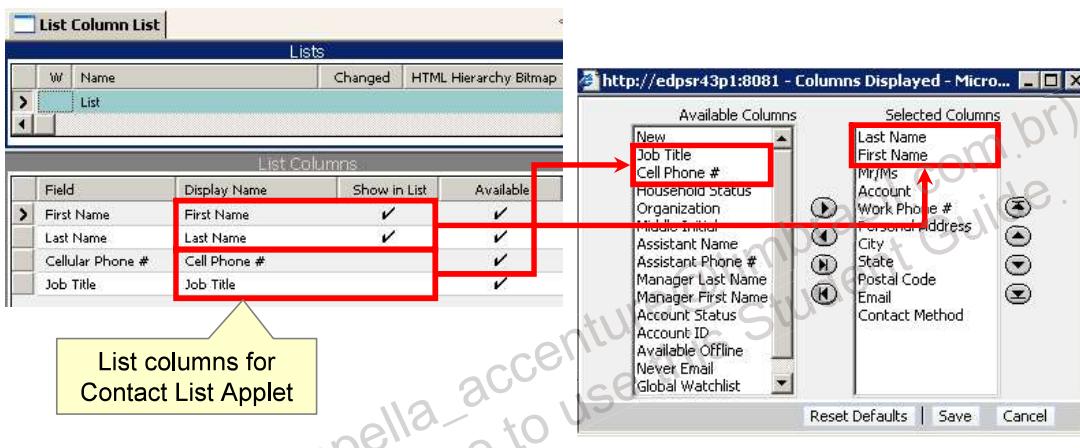


Applet Web Layout Editor

Reference: “Editing Applet Layout” in *Configuring Siebel Business Applications*

Show in List Property

- Determines if a column mapped to a placeholder is displayed by default when the applet is invoked
 - If not displayed, the column is available for display using Columns Displayed in the client



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Show in List Property

End users of the application can also use the Columns Displayed feature to rearrange the order in which the columns are displayed in the applet.

Number of Rows Displayed

- The number of rows displayed in a list applet is specified using the HTML Number of Rows property for an applet
 - If blank, number of rows is specified by the NumberOfListRows parameter in the application .cfg file
 - Defaults to a value of 10 if the parameter does not appear in the file

Name	HTML Number Of Rows	Business Component
Contact List Applet (WCC Home)	5	Contact
Contact List Applet Tiny	5	Contact
Contact Activity List Applet (RTD)	4	Action
Contact-Prospect Campaign List Applet - Non Admin	4	Contact-Prospect Campaigns
Contact Address List Applet - CE		Contact
Contact Category List Applet (Contact Search)		Contact Category
Contact Company Activities List Applet Web		Action Contact Company Activities
Contact Company Coverage List Applet Web		Position Contact Company Cover
Contact Household List Applet - Summary		Household

Number of Rows Displayed

The number of rows displayed in a list applet should be changed only in rare situations to make sure the application maintains a consistent look and feel.

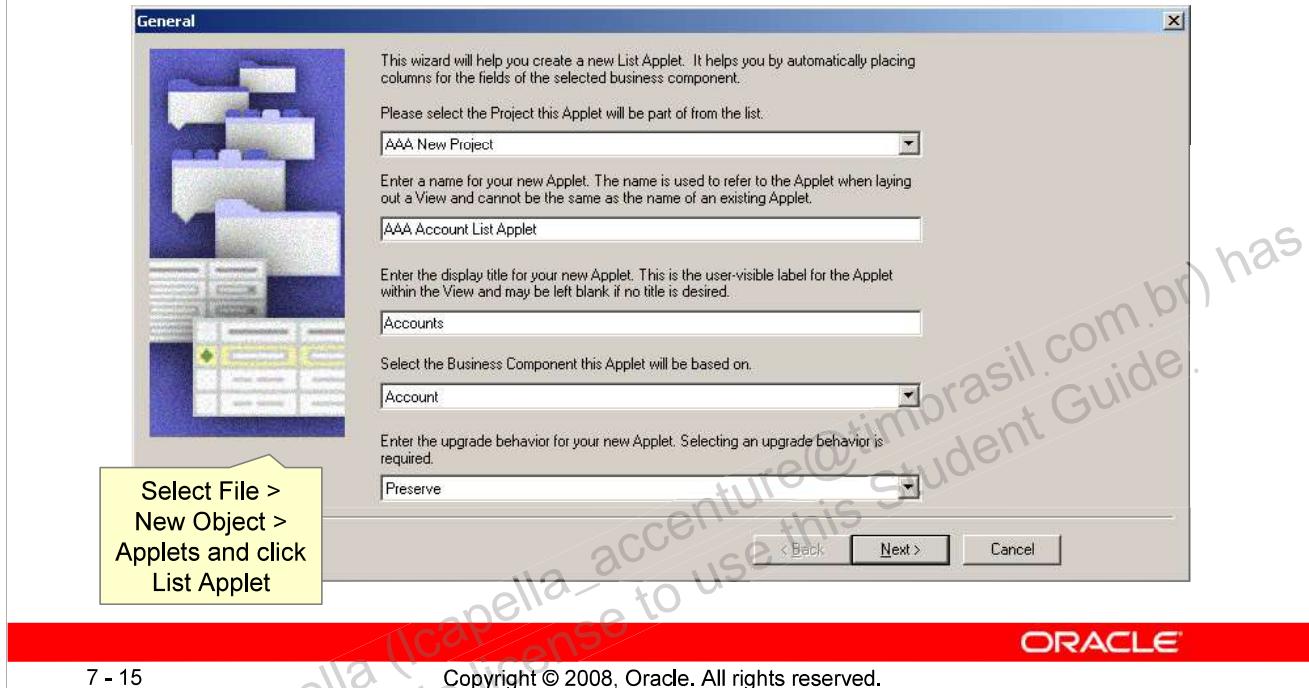
Show More Button

- Allows users to toggle between a base number of rows (show less) and an expanded number of rows (show more)
 - Is specified by the NumberOfMaxListRows parameter in the application .cfg file
 - Defaults to a value of 20 if the parameter does not appear in the file
- Is included on most list applets



Creating a List Applet

- Use the List Applet wizard to create a new list applet

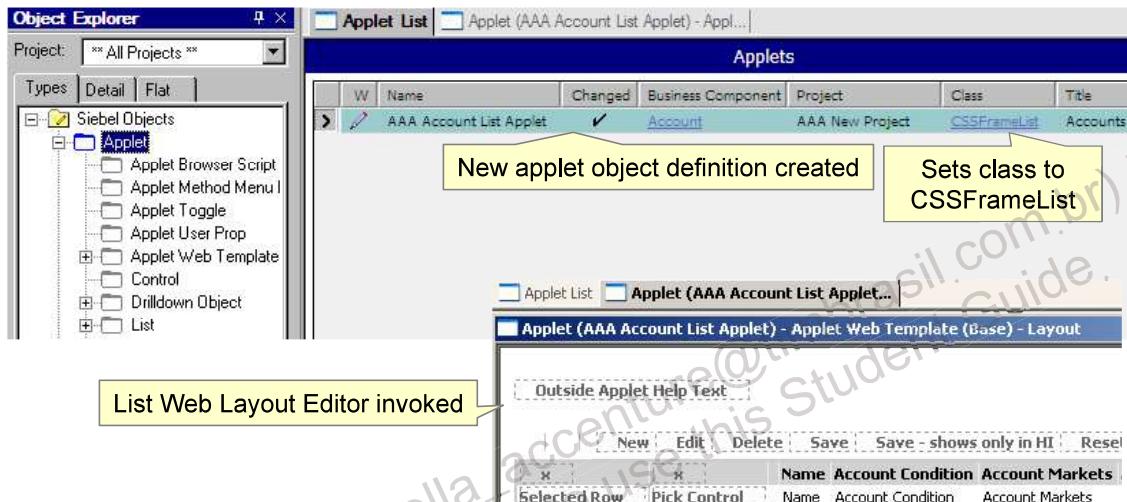


List Applet Wizard Inputs

- Project to contain the new applet
- Name and display title for the list applet
- Business component for the applet
- The upgrade behavior
- The Web templates that will be used for each mode
 - Base and EditList mode are commonly built using Applet List (Base/EditList)
 - Edit mode is commonly built using Applet List Edit (Edit/New/Query)
- The business component fields available to be mapped
- Additional controls that will be added to the applet
 - By default, all of the standard buttons are selected

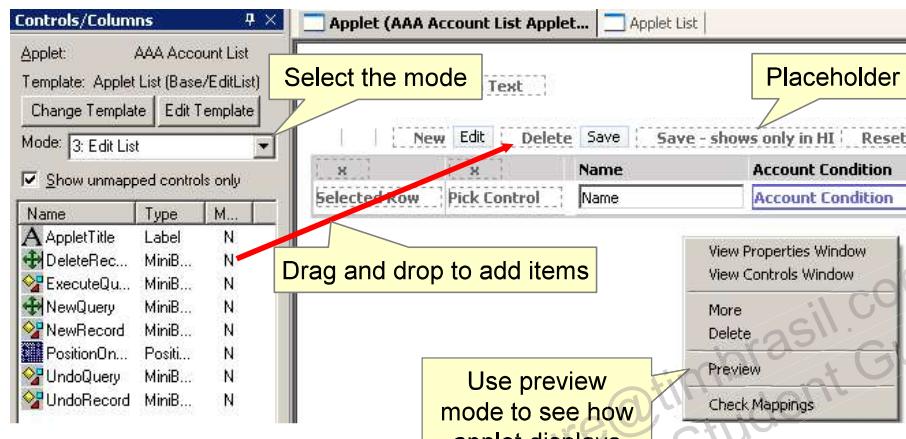
List Applet Wizard

- Creates an applet object definition including list, controls, applet web template, and applet web template items
- Invokes the Web Layout Editor



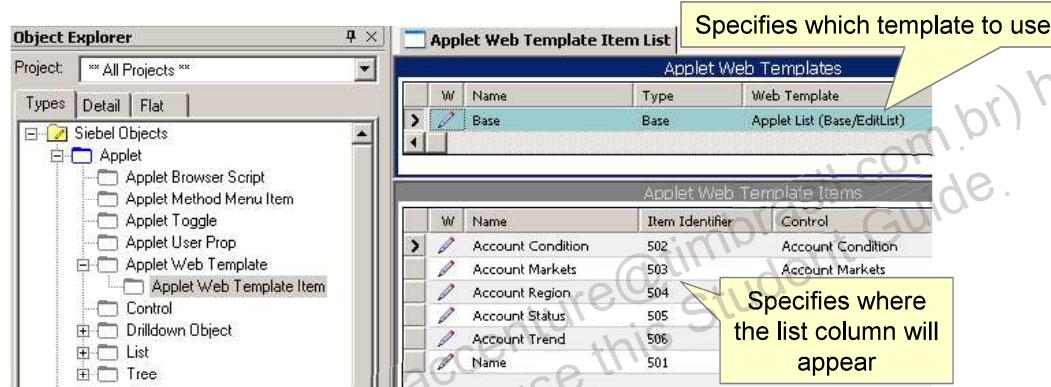
Web Layout Editor

- Use the Web Layout editor to rearrange or add other applet Web template items



Applet Web Template

- Specifies which template to use for each mode
- Contains Applet Web Template Items
 - Specifies the controls that have been bound to the template
 - Item Identifier determines where an item appears in the template



List Column Definitions

- Edit the List Column definitions to:
 - Set the column display name
 - Set the column to read only
 - Change the HTML Type
 - Enable special data entry features such as a picklist, calendar, or calculator popup
 - Set Runtime = TRUE



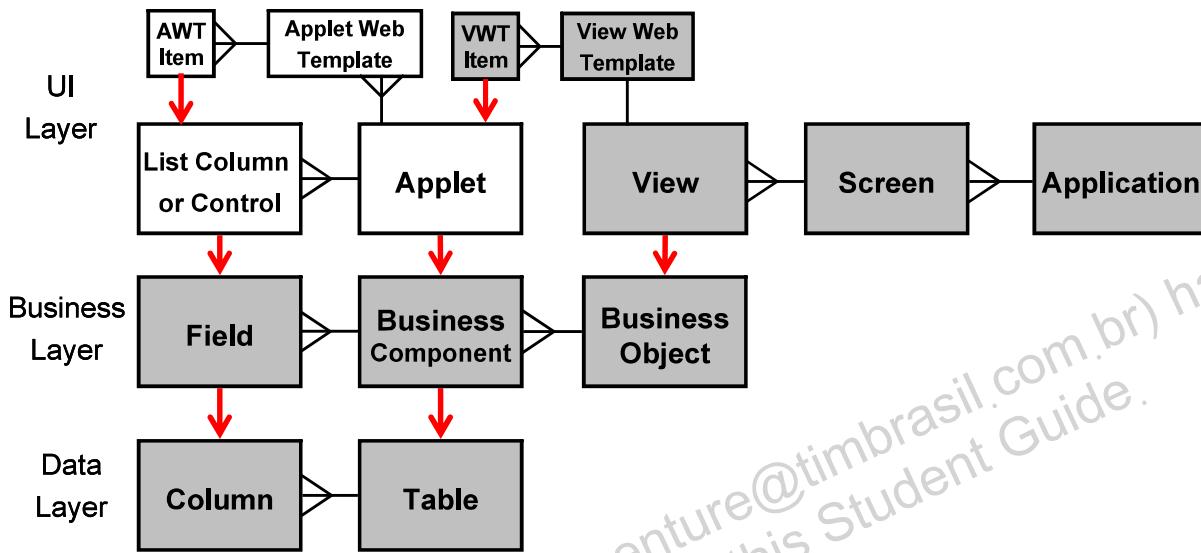
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List Column Definitions

Properties of List Columns

- HTML Type: This property determines how the list column is to be rendered. If not set, the application uses the Type property. There are numerous types of controls as defined by their HTML Type, and consult Bookshelf for a list of the possible types of controls
- Runtime: If set to True, this property enables the field to display a picklist, a calendar, or calculator at run time.

Summary of Object Types



Lesson Highlights

- List applets:
 - Display multiple records in a list
 - Contain fields for one record displayed in a single row
- The applet wizard is used to create new applets to ensure steps are not omitted
- The Web Layout Editor is used to add, remove, and reorder Web template items
- List column definitions specify the fields displayed and their display names

Practice 7 Overview: Configuring List Applets

This practice covers the following topics:

- Inspecting the configuration of a list applet
- Creating a new list applet

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Configuring Views

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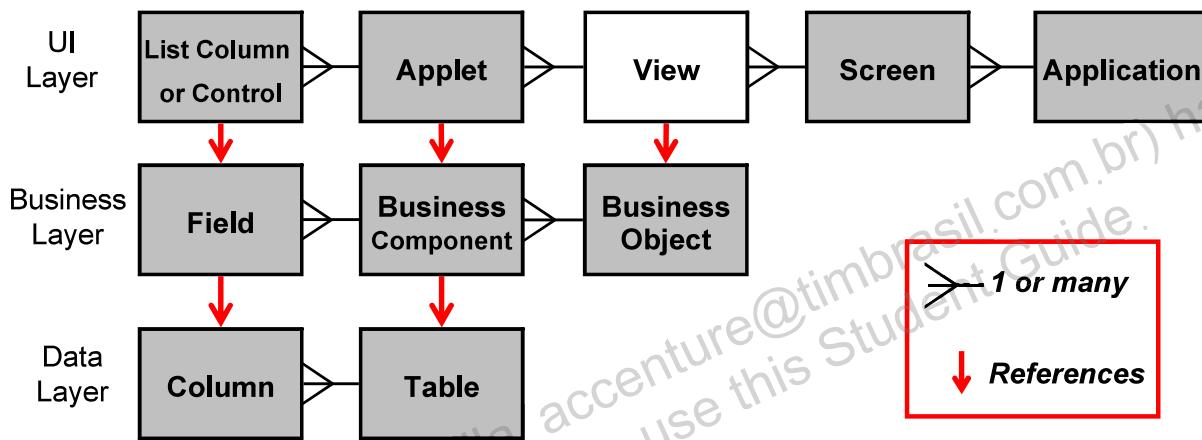
Objectives

After completing this module you should be able to:

- Create a new view and associate it with a view Web template
- Register and administer a view

View

- Consists of one or more applets
- References a business object that defines the relationships between business components displayed in the view
- Has an assigned view Web template



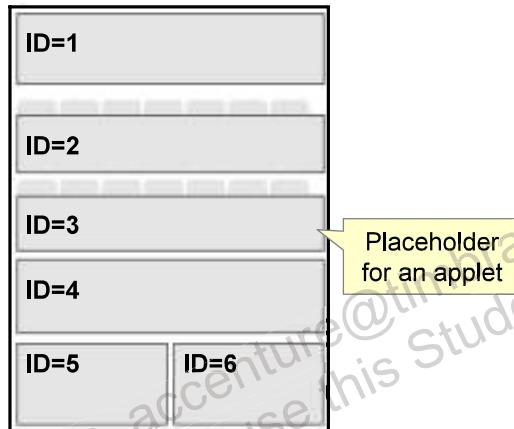
8 - 3

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View Web Templates

- Are used to render Siebel views in the user's browser
- Consist of tags (placeholders) for several applets
 - Typically not all tags are mapped
 - Unmapped tags are ignored when the view is rendered



View Web Templates

Reference: “Overview of Web Templates and Siebel Tags” in *Configuring Siebel Business Applications*

Applets in View Web Templates

- Can be related as:
 - Peers
 - Parent-child
 - Parent-child-grandchild

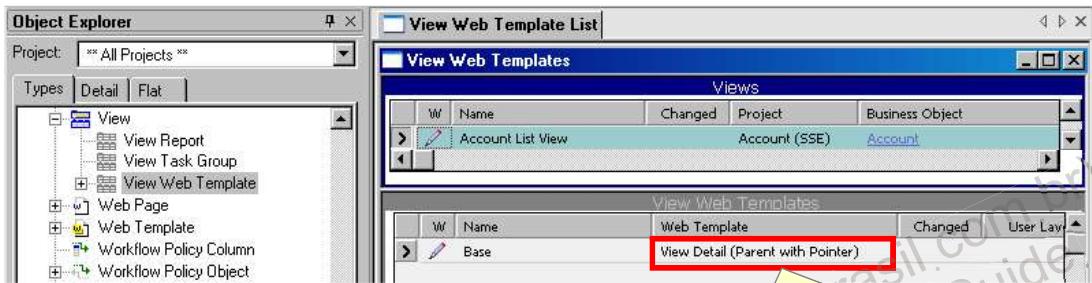


Applets in View Web Templates

For a complete list of View Web Templates, see *Siebel Developer's Reference*

Identifying the View Web Template

- Examine the Web Template property in the View Web Template object definition for the view



Identifying Applets Assigned to a View

- Examine the Applet property in View Web Template Item object definitions for the view

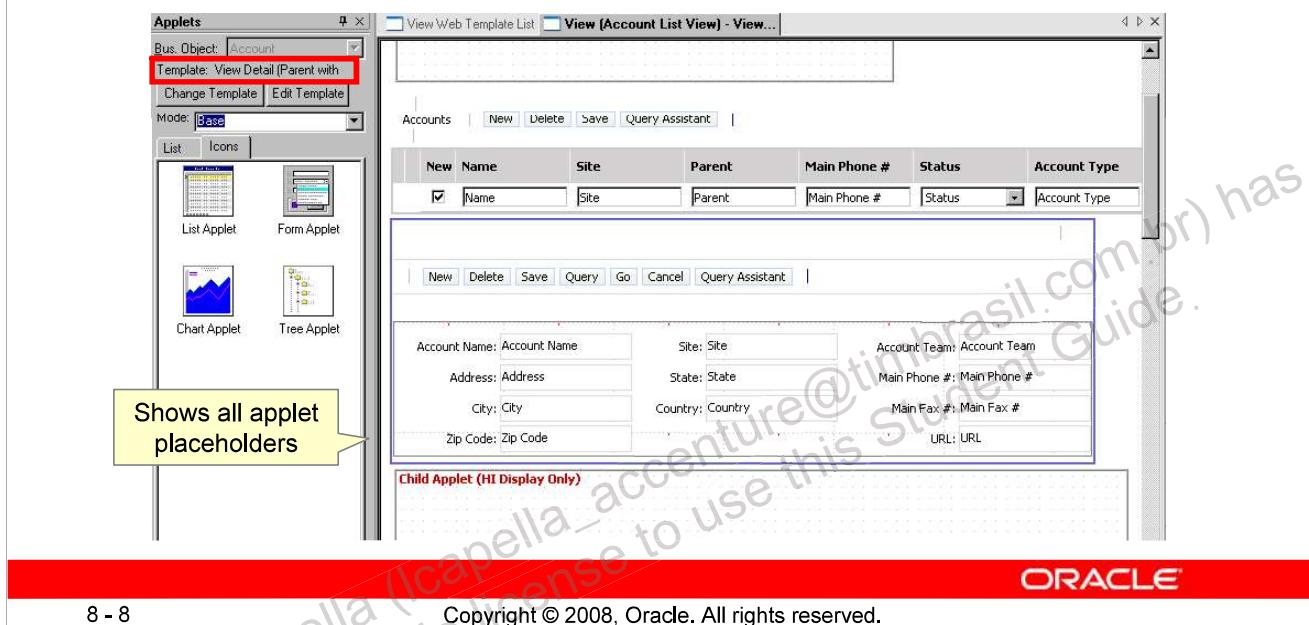
The screenshot displays four windows from the Siebel 8.1.x Tools interface:

- Object Explorer (Top Left):** Shows a tree view of objects under "View".
- View Web Template List (Top Right):** A grid view showing a single row for "Account List View". The "Name" column is highlighted with a red box.
- Object Explorer (Bottom Left):** Shows a tree view of objects under "View".
- View Web Template Item List (Bottom Right):** A grid view showing two rows of applets assigned to the view. The columns are "Name", "Applet", and "Item Identifier". The "Name" column is highlighted with a red box, and the "Applet" column shows "SIS Account Entry Applet" and "SIS Account List Applet".

A large watermark reading "Leonardo Cappella (capella_academy@tin.it) has a non-transferable license to use this material" is diagonally across the screen.

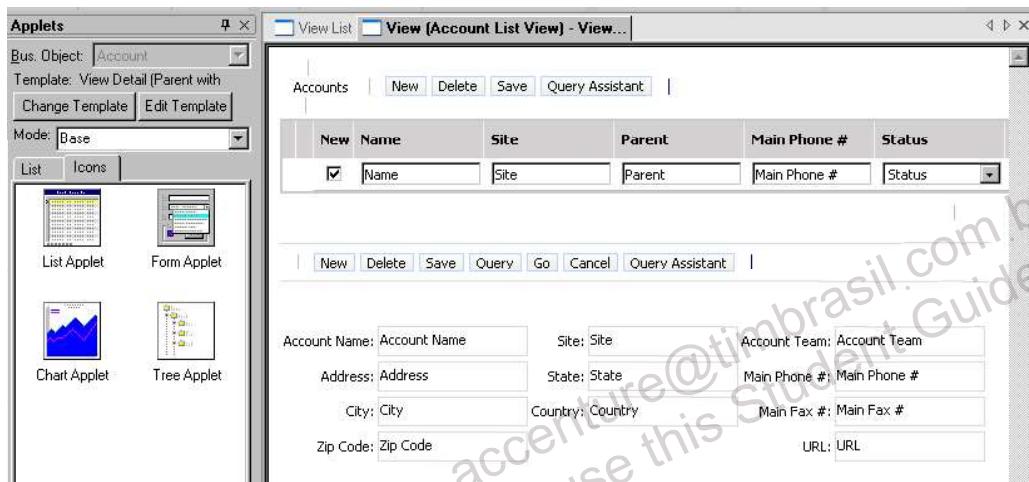
Web Layout Editor

- Is used to examine or modify the current layout of the view
 - Invoke by right-clicking the view and selecting Edit Web Layout



Preview Mode

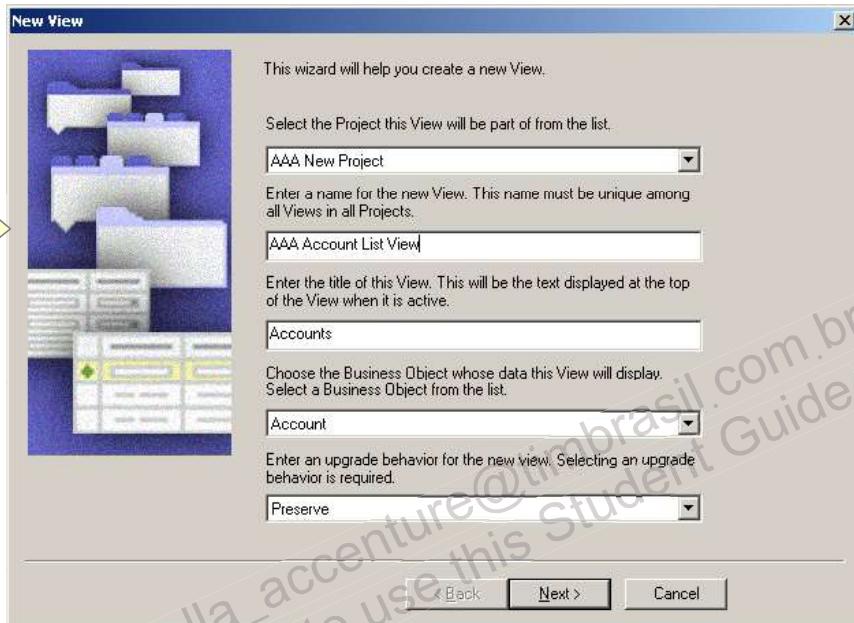
- Use preview mode to examine how the view will display when rendered in a browser
 - Right-click in the editor and select Preview



Creating a View

- Use the View wizard to create a new view

Select File >
New Object and
click View



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Creating a View

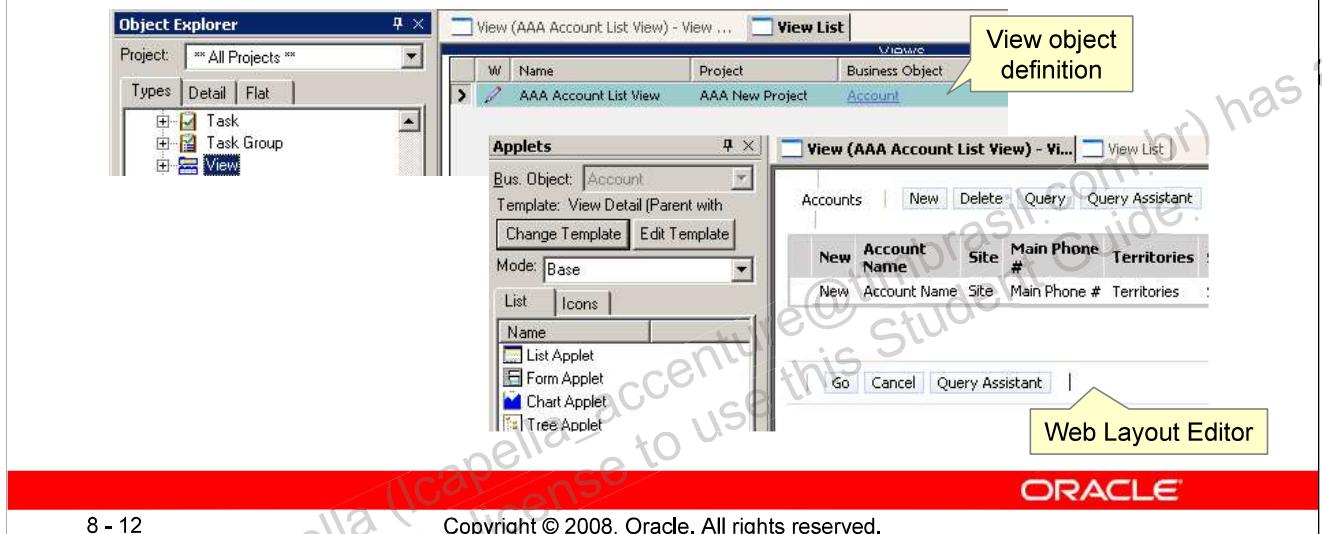
It is good practice to append a project-specific prefix (such as AAA) to all object definitions that you create. This allows you to easily distinguish your newly created object definitions from those delivered in the Siebel repository.

Inputs for the View Wizard

- Project to contain the new view
- Name and display title for the view
- Business object for the view
- The upgrade behavior
- The Web template for the view
 - If you are uncertain which template to use:
 - Find an existing view that has the desired layout
 - Examine its view Web template object definition
- The applets for the view

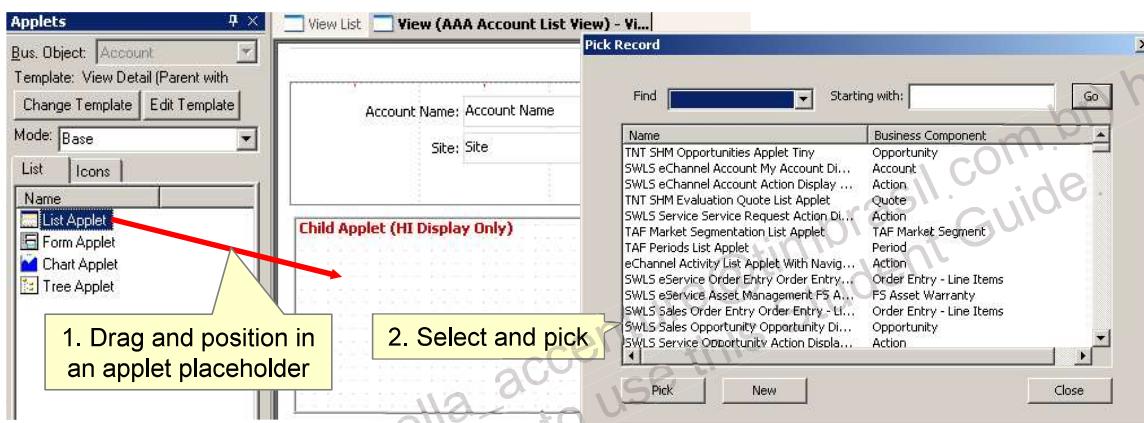
View Wizard

- Creates a view object definition
 - Assigns a business object to the view
- Specifies a Web template for the view
- Invokes the Web Layout Editor



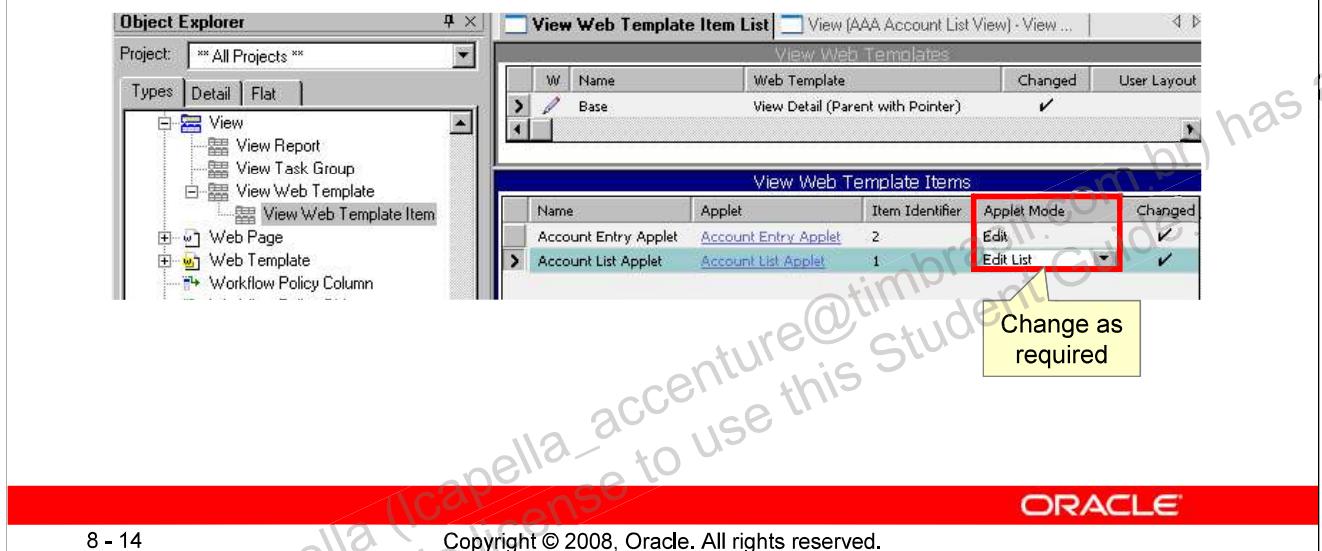
Web Layout Editor

- Use the Web Layout editor to rearrange, add, or delete applets
- To add an applet:
 - Drag an applet type from the Applets window
 - Select an applet from the picklist



Adjust the Applet Mode

- Examine the view Web template items for the new view
- Set the applet mode to Edit List for list applets
 - Is set to Base by default



Additional Steps After Configuring a New View

- Additional steps include:
 - Assigning the view to a screen (*discussed in next lesson*)
 - Compiling all new and modified object definitions
 - Administering a new view in the client

Administering a New View in the Client

The steps to administer a new view:

1. Register the View
2. Assign the View to a Responsibility

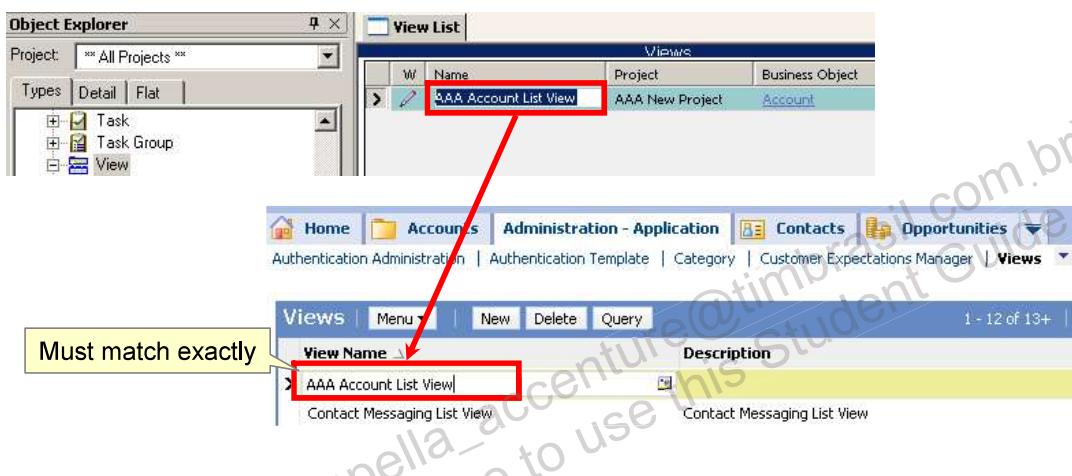


Administering a New View in the Client

Siebel Personalization allows administrators to create personalization rules that can hide views and applets within views from a user based among, other things, characteristics of the user. Personalization rules modify the declarative configuration of views as specified in Siebel Tools. Consequently different users might not see all the same applets within a given view.

1. Register the View

- Use the client application to register the view
 - Copy the view name from the object definition in Tools
 - Navigate to Administration - Application > Views
 - Paste the view name



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1. Register the View

Reference: "Initial Setup" in *Siebel Applications Administration Guide*

2. Assign the View to a Responsibility

- Navigate to Administration - Application > Views to assign the view to one or more responsibilities
 - Assign the view to developers for unit testing and to users for system testing and production

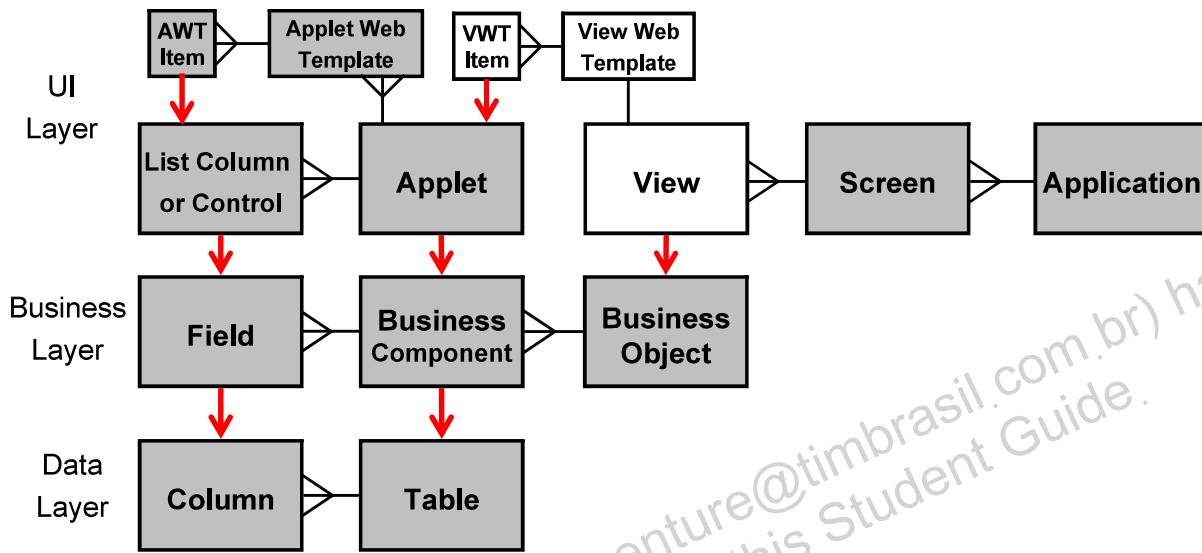
The screenshot shows the Siebel application interface with the following details:

- Top Navigation Bar:** Home, Accounts, Administration - Application (selected), Contacts.
- Sub-navigation:** Authentication Administration | Authentication Template | Category | Views (selected).
- Views List:** Shows a table with columns "View Name" and "Description". One row is selected: "AAA Account List View".
- Responsibilities List:** Shows a table with columns "Responsibility" and "Description". One row is selected: "AAA TESTER".
- Callout Box:** A yellow callout box points from the "AAA TESTER" row to the text "Assign the view to a responsibility".
- Bottom Bar:** ORACLE logo.
- Page Footer:** 8 - 18, Copyright © 2008, Oracle. All rights reserved.

2. Assign the View to a Responsibility

Reference: “Configuring Access Control” in *Siebel Security Guide*

Summary of Object Types



Lesson Highlights

- A View is associated with a Web template that defines its layout
 - Inspect the view Web Template to identify the template
- Use the Web Layout editor to rearrange, add, or delete applets from an existing view
- Use the view wizard to create a new view
- In the client:
 - Register the view
 - Assign it to one or more responsibilities

Practice 8 Overview: Configuring Views

This practice covers the following topics:

- Modifying an existing view
- Creating a new view
- Administering a new view

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Configuring Applications and Screens

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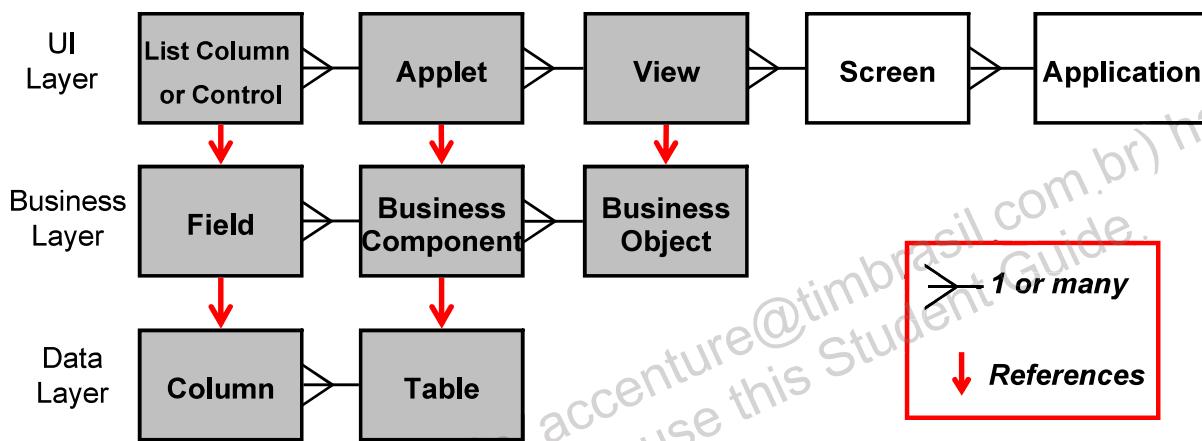
Objectives

After completing this lesson you should be able to:

- Specify the Web pages referenced by an application
- Configure the toolbars and menu items in an application
- Assign screens to an application
- Assign views to a screen and configure how the view is accessed from the screen

Application

- Is a collection of screens through which users navigate
- Displays a single Siebel view within a container page



The Container Page

- Is a Web page that specifies the elements that surround a Siebel view
 - Renders the menus, toolbars, screen tabs, and so forth
- Is specified in the Application object definition

The screenshot shows the Siebel Business Applications interface with three main windows:

- Object Explorer**: Shows the project "All Projects" and types: Siebel Objects (Applet, Application, Business Component).
- Application List**: Shows the Applications list with one entry: Siebel Universal Agent, Container Web Page CC Container Page.
- Web Page List**: Shows the Web Pages list with entries: CC Container Page, CC Container Page (FINS eSales), CC Container Page (New Account), DotCom Page Container (Framed), and Page Container.

A red arrow points from the "Container Web Page" field in the Application List window to the "Web Page" entry in the Web Page List window, indicating the relationship between the application definition and the container page object.

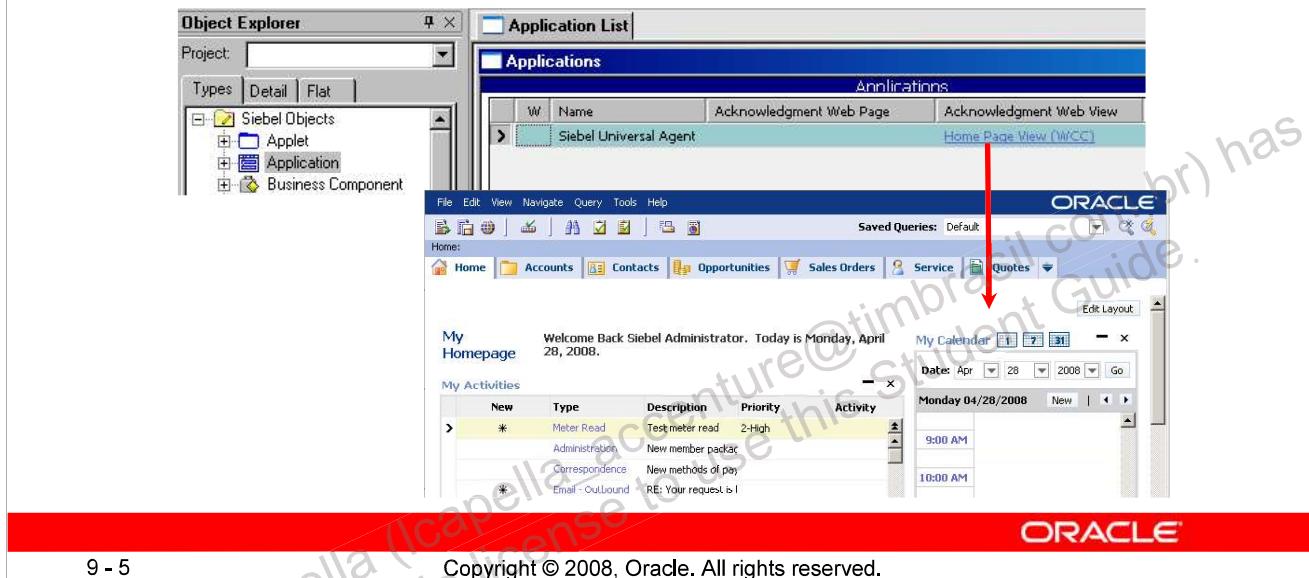
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The Container Page

Reference: “Configuring Web Page Objects” in *Configuring Siebel Business Applications*

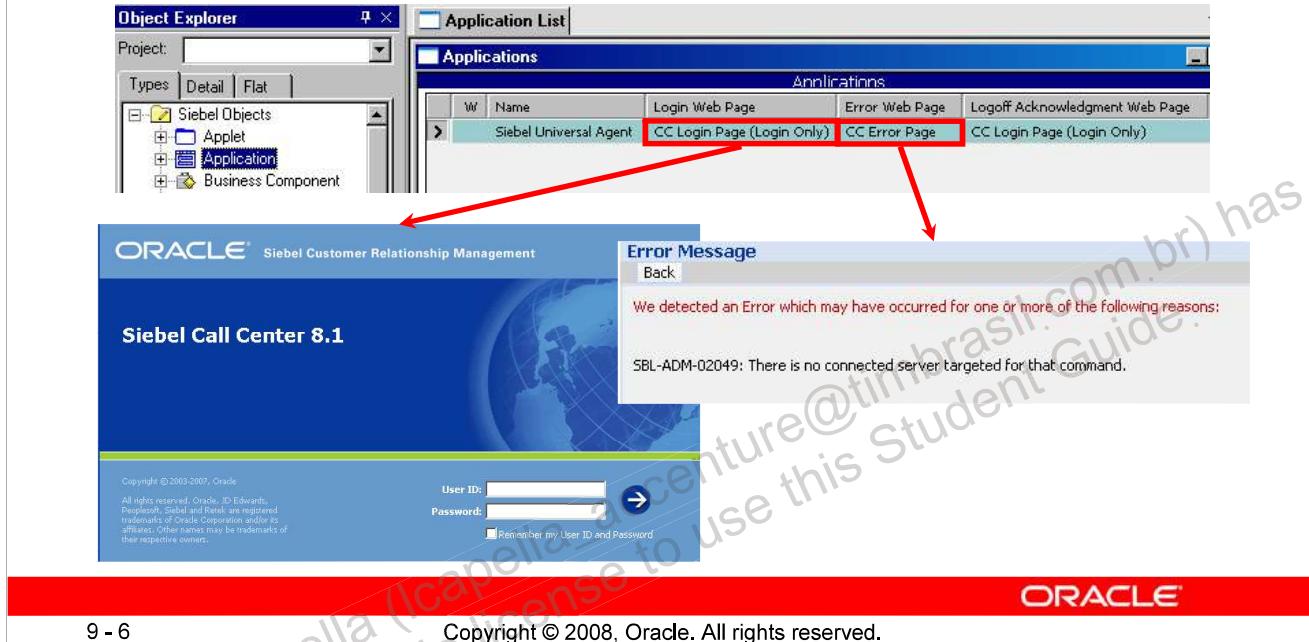
Acknowledgement Web Page/View

- Specifies the Web page to be displayed after a user logs in
 - Must specify either an Acknowledgement Web Page or an Acknowledgement Web View property



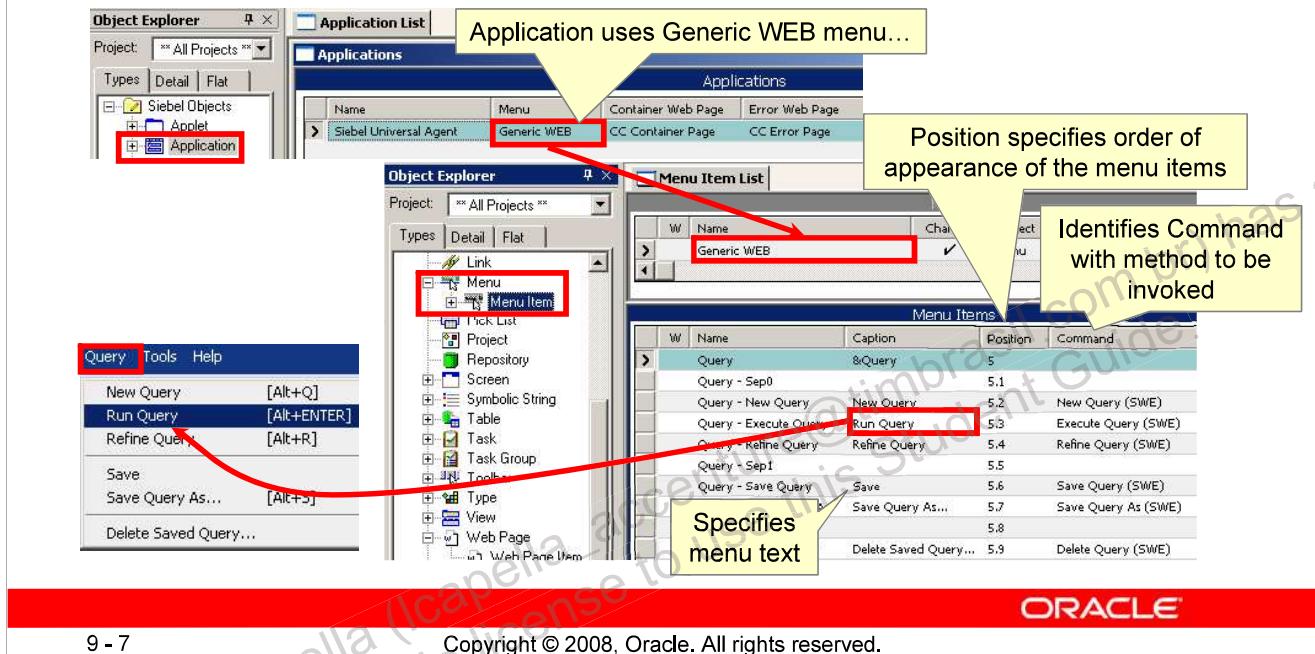
Additional Web Pages

- The application object also specifies additional Web pages that can be displayed to users



Application-Level Menus

- Are specified using the Menu property
- Are defined in the Menu object definition



Application-Level Menus

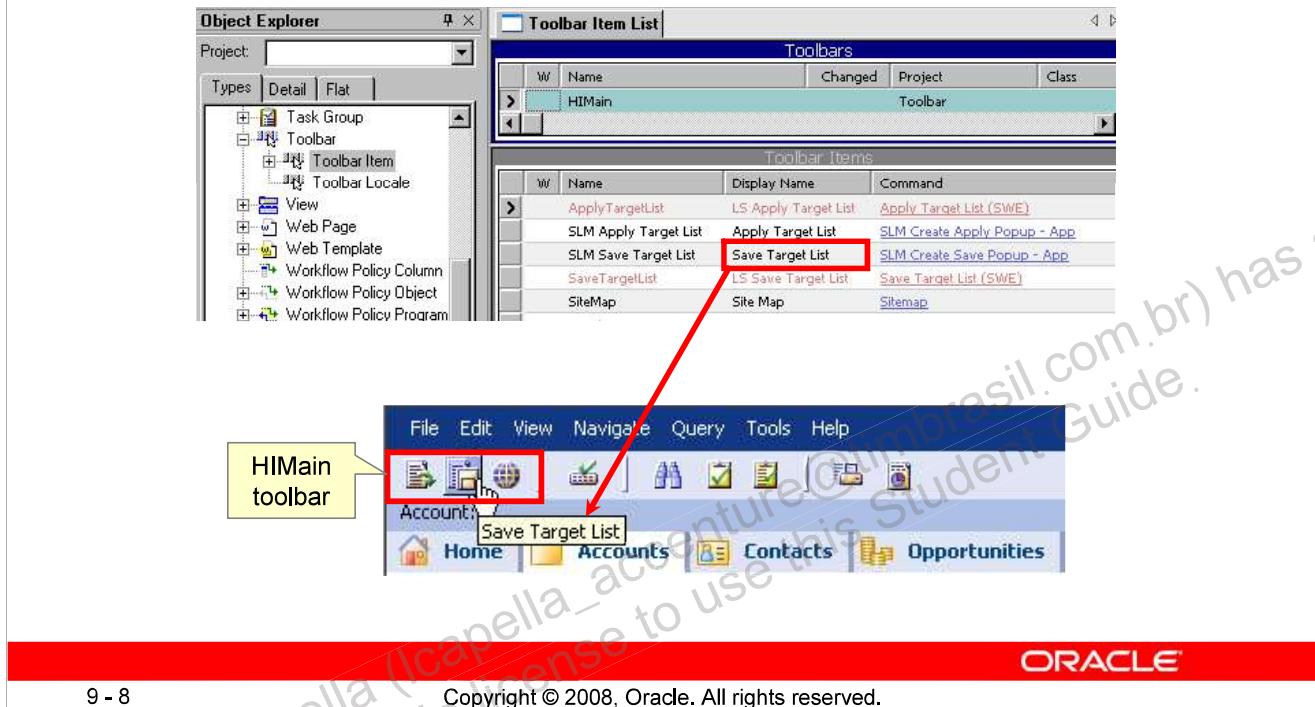
Nested Menus

- The nesting of menu items is specified by a decimal point followed by a position number for the menu item.

Reference: “Configuring Toolbars and Menus” in *Configuring Siebel Business Applications*

Toolbars

- Are defined in the Toolbar object definition



Toolbars for an Application

- Are not specified directly in the Application object definition
- Are specified in the Web templates used by the Application object definition
 - Siebel Universal Agent uses toolbars specified in the CCFrameViewbar template referenced by the container page



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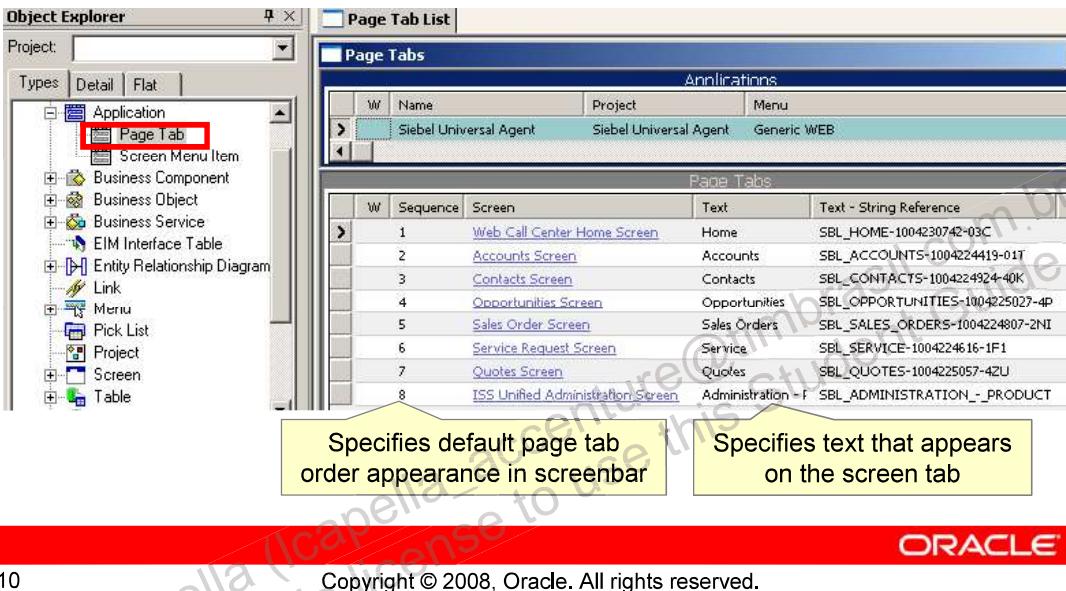
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Toolbars for an Application

Toolbars are referenced in the Web templates because toolbars are mode dependent.

Screen Tabs

- Are used to navigate among screens
- Are specified as Page Tab object definitions



Screen Tabs

The Page Tab object definitions specify the default order of the screen tabs. Individual users can customize the application by reordering the screen tabs, as well as exposing or hiding screen tabs. To do so a user selects (in the client application) Tools > User Preferences > Tab Layout.

Site Map Links

- Are specified as Screen Menu Item object definitions

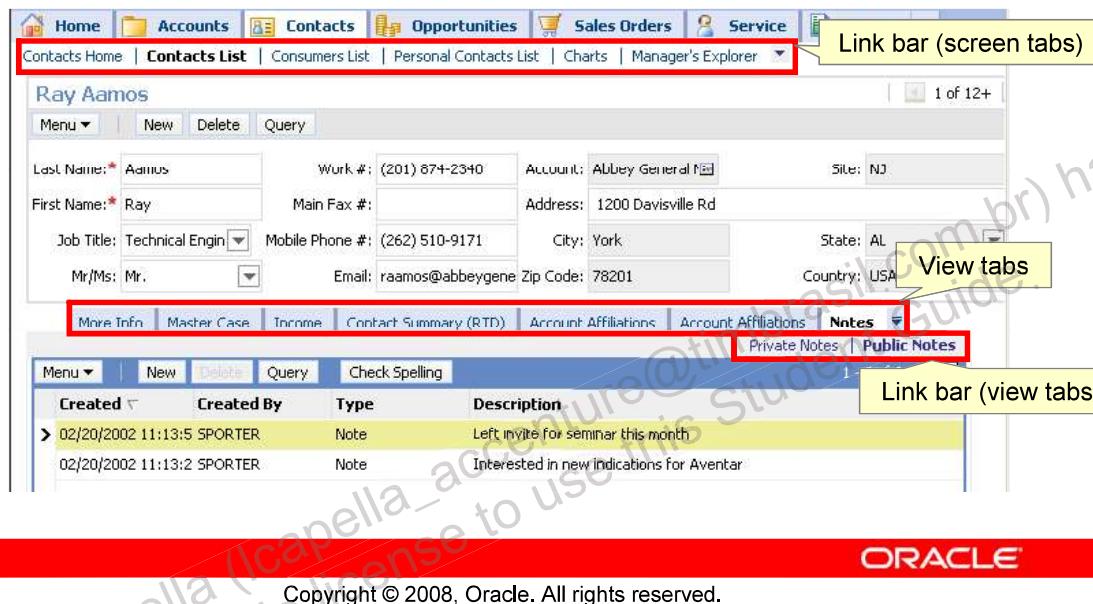
The screenshot shows the Siebel Object Explorer and the Screen Menu Item List window. In the Object Explorer, the 'Screen Menu Item' node under 'Siebel Objects' is selected. In the Screen Menu Item List window, a record for 'Siebel Universal Agent' is shown. The 'Screen Menu Items' table lists various screen definitions with their corresponding site map text. A red box highlights the 'Text' column for the 'Accounts Screen' and 'Activities Screen' entries, which are both set to '&Accounts' and 'Acti&ties' respectively. A yellow callout box points to this red box with the text 'Specifies text that appears in the site map'. Below the tables, a 'Screens' section displays links to 'Accounts' and 'Activities' screens, with 'Accounts' also highlighted by a red box. The Oracle logo is visible at the bottom right.

Screen	Text
Accounts Screen	&Accounts
Activities Screen	Acti&ties
Administration - Order Management	Administration - Order Management
Agreement Screen	&Agreements
Alignment Management	
Asset Management Screen	&Assets
Assignment Administration Screen	Administration - &Assignment
Auction Administration Screen	Administration - Auction

Specifies text that appears in the site map

Screens and Views

- Screen and Screen View object definitions specify:
 - Which views appear in a screen
 - Where a view is accessed within a screen



Views for a Screen

- Are specified by Screen View objects

The screenshot illustrates the relationship between Siebel's Object Explorer and the Site Map. In the Object Explorer, under the 'Screen' category, 'Screen View' is selected. The Site Map shows a navigation bar with links for Home, Accounts, Administration - Application, and Contacts. The 'Accounts' link is highlighted. Below the Site Map, a detailed view of the 'Screen Views' table is shown, mapping sequence numbers to names, display in site map status, menu text, viewbar text, and status text. A red arrow points from the 'Sequence' column in the table to the 'Sequence' column in the Site Map navigation bar, indicating the order of appearance. Another red arrow points from the 'Name' column in the table to the 'Accounts' link in the Site Map, indicating the name used in the site map. A third red arrow points from the 'Viewbar Text' column in the table to the 'Accounts Home' link in the Site Map, indicating the name used in the link bar or view tab.

Sequence	Name	Display In Site Map	Menu Text	Viewbar Text	Status Text
1	FINS CI Account Coverage Team	✓	Coverage Team	Coverage Team	
2	FINS CI Account Primary Product	✓	Primary Product	Primary Product Group M	Primary Prod
3	Account Screen Homepage View	✓	Accounts Home	Accounts Home	
4	Account List View	✓	&My Accounts	My Accounts	View your ac
5	Account List	✓	Accounts List	Accounts List	

Specifies the order the view appears in the screen Name that appears in site map Name that appears in link bar or view tab

Accounts

- Account D&B Explorer
- Account Management
- Accounts Administration
- Accounts Home
- Accounts List
 - Account Affiliations
 - Account Catalogs

Home Accounts Administration - Application Contacts

Accounts Home | Accounts List | Charts | Global Accounts Hierarchy List | Global

ORACLE

Screen View Types and Categories

- Type defines the type of view within the screen
 - Aggregate category
 - Aggregate view
 - Detail category
 - Detail view
- Category and Parent Category allow views to be grouped

The screenshot shows the Siebel Object Explorer interface. On the left, the Object Explorer pane displays a tree structure of project types: Entity Relationship, Link, Menu, Pick List, Project, Screen, Screen View, and Table. The 'Screen View' node is selected. The main workspace is titled 'Screen View List' and contains two tables: 'Screens' and 'Screen Views'.
Screens Table:

W	Name	Changed	Project	Viewbar Text	Viewbar Text - String Reference	Viewbar Text - String Override
	Accounts Screen	✓	Account (SSE)	Accounts	SBL_ACCOUNTS-1004224419-01T	

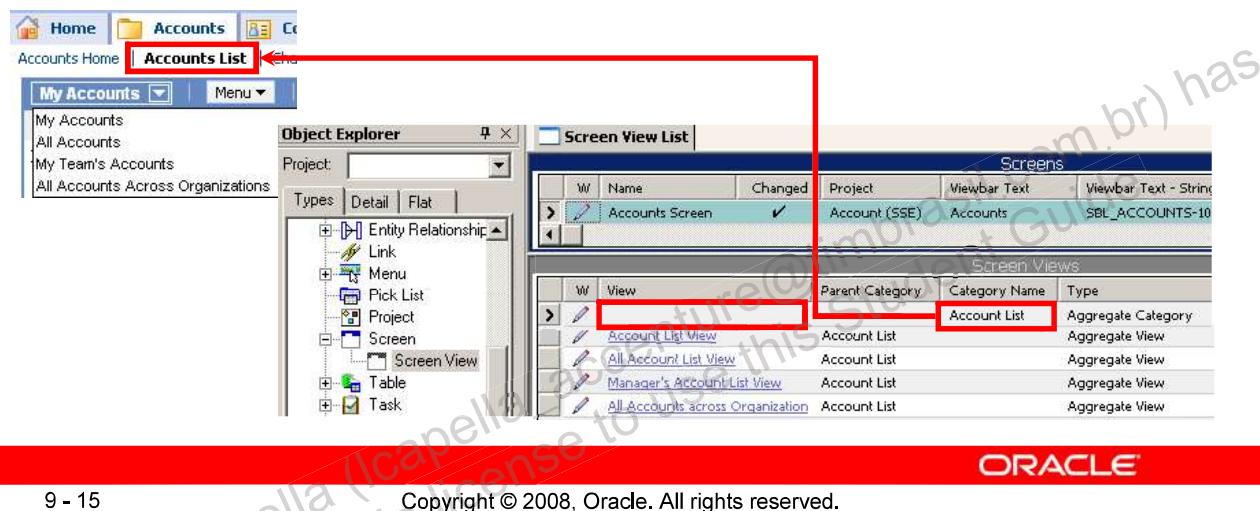
Screen Views Table:

W	Sequence	Name	View	Parent Category	Category Name	Type
	3	Account Screen Homepage View	Account Screen Homepage View			Aggregate View
	4	Account List View	Account List View	Account List		Aggregate View
	5	Account List			Account List	Aggregate Category
	6	Account Detail View	Account Detail View	Account List		Detail View

A red box highlights the last three rows of the 'Screen Views' table, which represent the 'Account List' category and its associated views. The Oracle logo is visible at the bottom right of the interface.

Aggregate Category

- Is a container for a set of views accessible via a link in the linkbar
 - Can contain aggregate views, detail views, or detail categories
- Does not specify a view



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Aggregate Category

An aggregate category may group a series of related views. For instance in the Accounts screen , the Accounts List aggregate category contains a set of account list views. When there are multiple views in an aggregate category, the Category Default View property specifies the view to be displayed when a user clicks the link in the link bar.

Aggregate View

- Is a view accessed from either the:
 - Link bar (parent category is blank)
 - Visibility filter drop-down list (parent category references an aggregate category)

The screenshot illustrates the Siebel 8.1.x Tools interface, specifically the Object Explorer and Screen View List panels, demonstrating how aggregate views are defined.

Object Explorer: Shows the navigation tree under the "Screen" category, with "Screen View" selected. Under "Screen View", it lists several views: "All Accounts Across Organizations", "Manager's Account List View", "All Account List View", "Account List View", and "Account Screen Homepage View".

Screen View List: A table showing the definition of various screen views. The columns are: W, Name, Changed, Project, and Viewbar Text.

W	Name	Changed	Project	Viewbar Text
>	Accounts Screen	✓	Account (SSE)	Accounts

Screen Views: A table showing the details of each screen view, including Viewbar Text, Type, and Parent Category.

View	Viewbar Text	Type	Parent Category
All Accounts Across Organizations	Aggregate View	Account List	
Manager's Account List View	Aggregate View	Account List	
All Account List View	Aggregate View	Account List	
Account List View	Aggregate View	Account List	
Account Screen Homepage View	Aggregate View	Aggregate View	
All Accounts	Aggregate View	Account List	
My Accounts	Aggregate View	Account List	
Accounts Home	Aggregate View	Aggregate View	

Detail Category

- Is a container for a set of detail views
 - Appears as a view tab when navigating to detail views in the parent aggregate category
- Is used to group related detail view together to save space

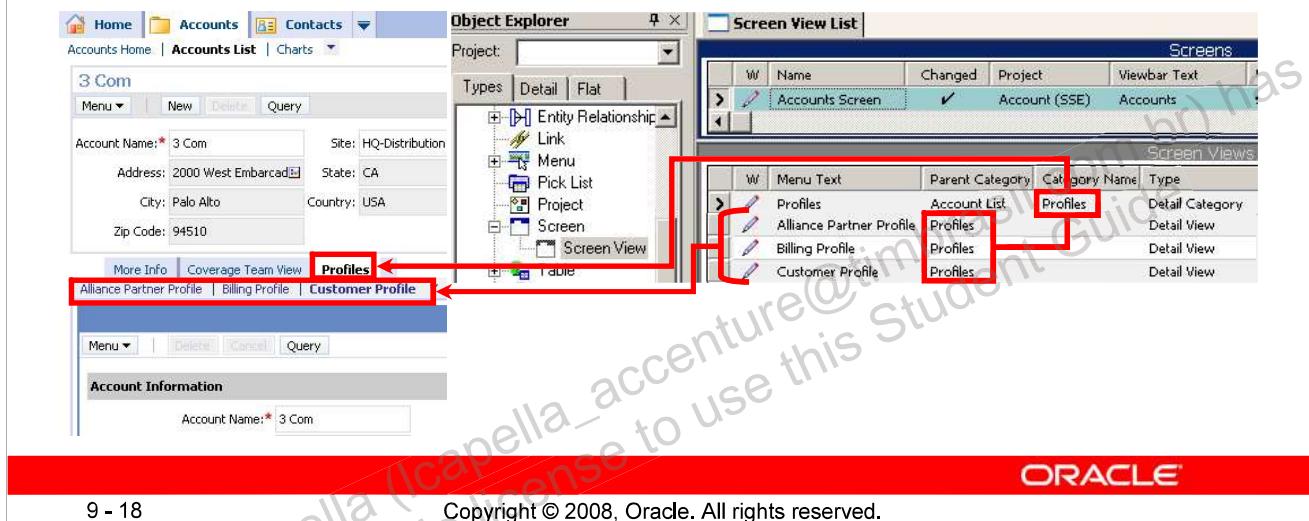
The screenshot shows the Siebel 8.1.x Tools interface. On the left, the Object Explorer window displays a tree structure of objects like Entity Relationship, Link, Menu, Pick List, Project, Screen, Table, and Screen View. A red box highlights the 'Screen View' node under 'Screen'. On the right, the Screen View List window shows a list of screens. A red box highlights the 'Accounts Screen' entry. Below it, the Screen Views table lists four detail views: 'Profiles' (Parent Category: Account List, Category Name: Profiles), 'Alliance Partner Profile' (Parent Category: Profiles), 'Billing Profile' (Category Name: Profiles), and 'Customer Profile' (Category Name: Profiles). A red box highlights the 'Account List' and 'Profiles' columns. At the bottom of the interface, there is a red banner with the text 'Leonardo Cappella (capella_accenture@timbasil.com) - as a non-transferable license to use this Student Guide'.

#	Name	Changed	Project	Viewbar Text
1	Accounts Screen		Account (SSE)	Accounts

#	W/	Menu Text	Parent Category	Category Name	Type
1	>	Profiles	Account List	Profiles	Detail Category
2	>	Alliance Partner Profile	Profiles		Detail View
3	>	Billing Profile	Profiles		Detail View
4	>	Customer Profile	Profiles		Detail View

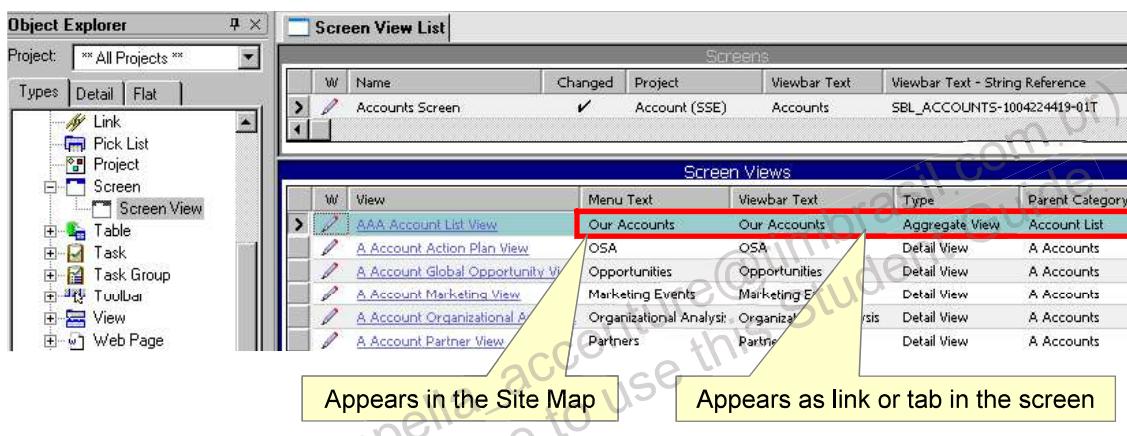
Detail View

- Is a single view that appears:
 - As link in a separate link bar below the view tab bar
 - Parent category is a detail category
 - Else as a view tab



Assigning a View to a Screen

- Create a new Screen View object definition
 - Select the new view to add it to the screen
 - Enter Menu and Viewbar Text
 - Configure the Type and Category to specify where users access the view

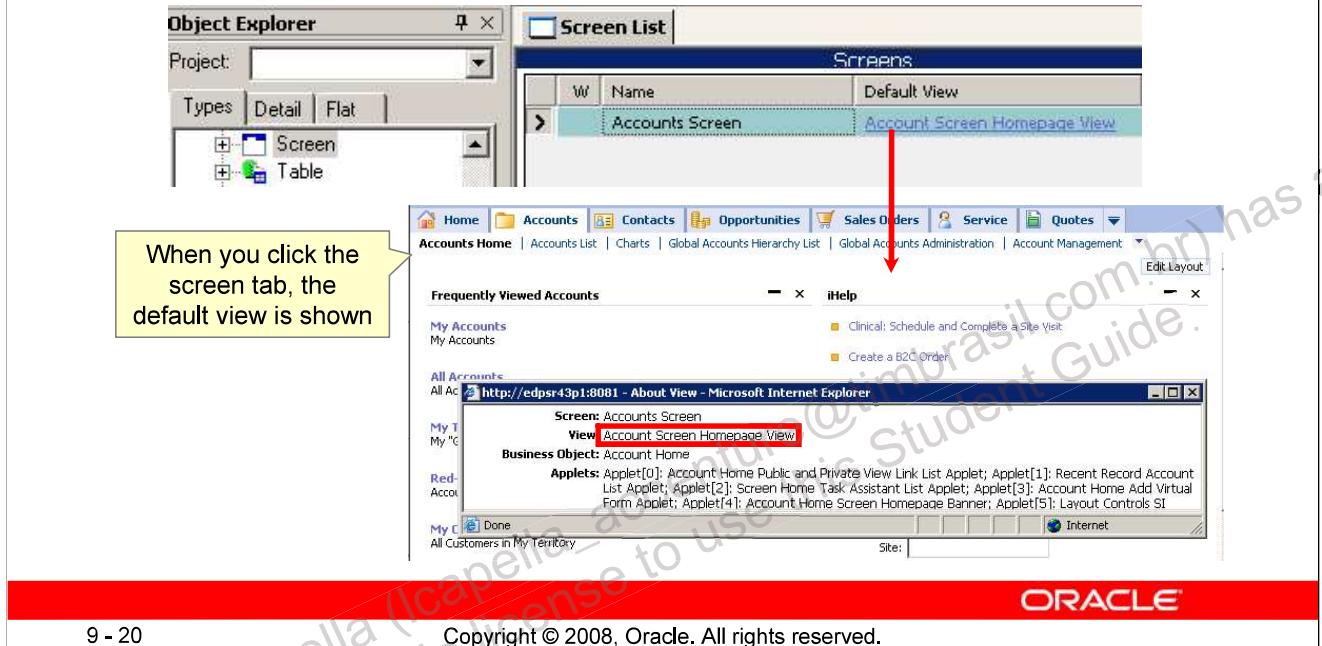


Assigning a View to a Screen

If Menu or Viewbar text is not provided in a screen view object definition, the string EMPTY is displayed in the user interface at run time.

Specifying the Default View for a Screen

- Set the Default View property in the screen object definition to specify the default view for the screen



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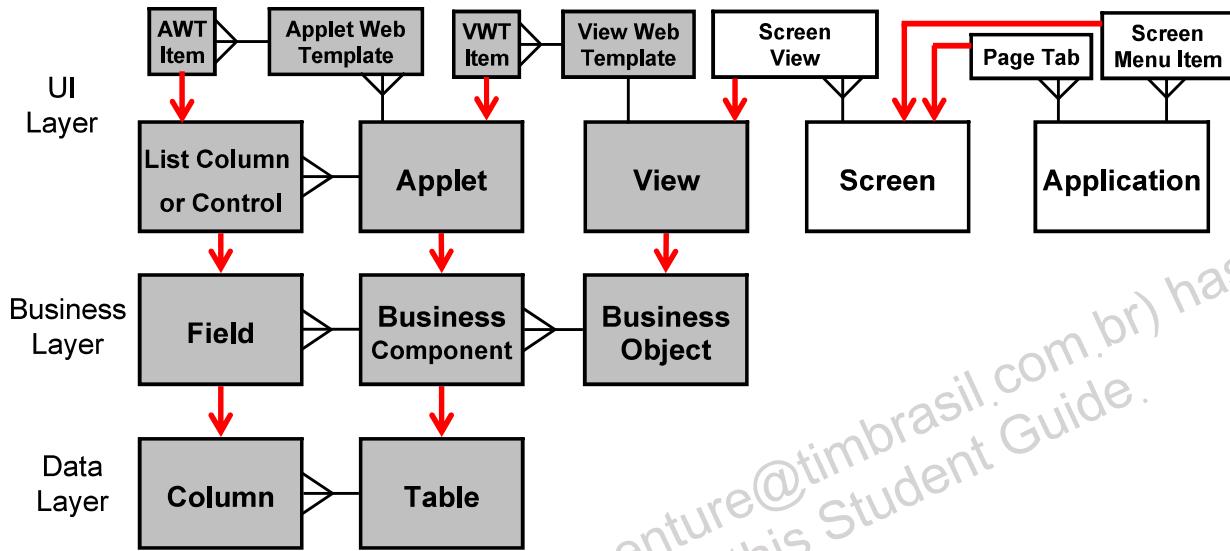
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Specifying the Default View for a Screen

A user can override the default view for a screen and change the sequence that views appear in a screen by setting user preferences in the client.

Reference: “Configuring Screens and Views” in *Configuring Siebel Business Applications*

Summary of Object Types



Lesson Highlights

- Applications are groups of screens through which users navigate
 - Page tabs and screen menu items specify links to screens
- Menu items and toolbar items can be configured for an application
- Screens are containers for views
 - Screen views specify the views assigned to a screen
 - Screen views come in four types: aggregate view, aggregate category, detail category, and detail view

Practice 9 Overview: Configuring Applications and Screens

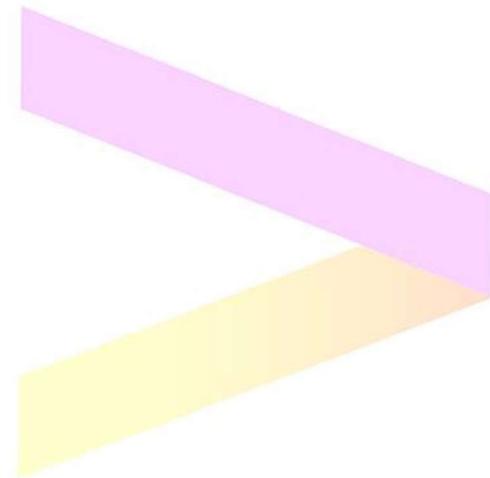
This practice covers the following topics:

- Adding a view to a screen
- Creating a detail category
- Modifying application menus and toolbars



Symbolic Strings

- Concentra todas las Strings que se muestran por pantalla, permitiendo reutilización y consistencia
- Multilenguaje. Las Symbolic Strings admiten la configuración de traducciones para cada idioma en que se desplegará la Aplicación





Symbolic Strings – Propiedades significativas

Nombre único dentro del Repositorio

Los nuevos registros creados por los desarrolladores tienen nombres que comienzan con un prefijo definido en el archivo CFG de Tools (Sección [Siebel], parámetro SymStrPrefix)

Perspectiva tiene ; SymStrPrefix parameter SymStrPrefix = standard.xml needs to be X_ for siebel = X_ =

Este parámetro debe ser consistente entre ambientes donde se vayan a aplicar los SIFs de las Symbolic Strings

Symbolic Strings							
	Name	Changed	Current String Value	Project	Type	Approved	Definition
	SBL__THE_TYPE_OF_RISK__-1004235901		The type of risk	Symbolic Strings	Conversion		
	SBL__REQUIRED-1004224401-021		* = Required	Symbolic Strings	Conversion		
	SBL__-1004224350-027		<	Symbolic Strings	Conversion		
	SBL__-1004224350-028		>	Symbolic Strings	Conversion		
	SBL__OTHER-1009065906-000		Other	Symbolic Strings	Conversion		
> X_BUSQUEDA POR PATENTE		✓	Búsqueda por Patente	NS Interfaces Customer Service			
<							

Symbolic String Locales

	Language	Changed	String Value	Parent Symbolic String	Redo	Inactive	Comments
> ENU		✓	Search by Number Plate	X_BUSQUEDA POR PATENTE			
< ESN		✓	Búsqueda por Patente	X_BUSQUEDA POR PATENTE			

Códigos de los idiomas en los que se podrá ingresar a la Aplicación

Valor que asumirá la Symbolic String para el idioma del registro



Symbolic Strings - Utilización

Opcional. Cualquier propiedad de texto que se muestre por pantalla (títulos, labels, etc.) de cualquier objeto de capa gráfica (applets, controles, vistas, aplicaciones, etc.) permitirá seleccionar una de las *Symbolic Strings* del Repositorio

Esta propiedad se completa automáticamente con la traducción de la *String Reference* al idioma activo de Tools, ó, con el *String Override*, si estuviera seteado

Valor arbitrario del Texto a mostrar por pantalla que tiene precedencia sobre la *Symbolic String* configurada

Applets

W	Name	Title	Title - String Reference	Title - String Override
>	NS Interfaces Busqueda por Patentes List Applet	Búsqueda por Patente	X_BUSQUEDA POR_PATENTE	

Title - String Reference

Current String Value	Name	Project Name	Definition
Best Version Integration Object Name	SBL_UCM_BV_IO_NAME	Symbolic Strings	Name of an i
Best Version Last Updated By	SBL_UCM_BV_UPT_BY	Symbolic Strings	The user na
Best Version Last Updated	SBL_UCM_BV_UPT_TIME	Symbolic Strings	The date of t
BIP Report Parameters	SBL_XMLP_REPORT_PARA	Symbolic Strings	Display as tit
Booking Guidelines	SBL_BOOKING_GUIDELIN	Symbolic Strings	Guidelines or
Búsqueda por Patente	X_BUSQUEDA POR_PATE	NS Interfaces Customer Ser	

Pick New Close