

System Name		Inquiry-to-Order and Order-to-Cash		Start Date			
Simulation Title		Siebel Query Functionality		Tech Review Date			
Slide	Screen Name	Callout Text	Recording Action	Callout Shape (Arrow or Rectangle)	Interactivity	Highlight Area	Notes
<div><div>Color key</div><div><div></div>Introductory slides at the beginning of the tutorial</div><div><div></div>Lesson overview slides</div></div>							
1	Title Page and Disclaimer	[insert pre-made slide]			Start button		Branded PPT background
2	User Recommendations and Navigation	[insert pre-made slide]			Continue button (goes to Menu of Lessons slide) Link to Change Screen Resolution slide Link to Hide Toolbars in IE slide		Branded PPT background
3	Change Screen Resolution instructions	[insert pre-made slide]			Back button (goes to User Rec and Nav slide)		Branded PPT background
4	Hide Toolbars in IE instructions	[insert pre-made slide]			Back button (goes to User Rec and Nav slide)		Branded PPT background
5	Siebel Query Functionality Overview	<p>Overview</p> <p>Querying is a way to locate one or more records that meet your criteria. Siebel offers many different ways to perform queries.</p> <p>You can use predefined queries that have already been set up by your division. You can also create and save your own queries, use the Query Assistant to find records, and use query operators to make a complex list of search criteria.</p> <p>The Siebel queries are used for:</p> <ul style="list-style-type: none">• viewing a subset of records on-screen• exporting a subset of records to a file <p>Please note: When you perform searches in Siebel, you must type the entries exactly as they appear in the record, or you will not get accurate results. You can find a table of case-sensitive entry information in your training guide.</p>			Back button (goes to User Rec and Nav slide) Continue button (goes to Menu of Lessons)		Branded PPT background
6	Menu of Lessons	<p>Choose a lesson:</p> <p>Run Predefined Queries</p> <p>Review Techniques for Running Queries</p> <p>Run Query Assistant</p> <p>Save a Query and Delete a Saved Query</p> <p>Export Query Records to a File</p>			Links to each lesson		Branded PPT background
	Run Predefined Queries	<p>Predefined queries are queries that are saved in Siebel and associated with your logon. You can use them on any list, header, or detail view to access specific records.</p> <p>In this lesson, you will access a list, execute a predefined query, and review the results.</p> <p>Audience: Sales, Global Sales, Marketing, Parker Integrated Partners, Customer Service, Pricing Cell Personnel, Pricing Analyst, Pricing Manager, Marketing Manager, General Manager, and Corporate Marketing</p>			Back button (goes to Menu of Lessons) Continue button (goes to next slide)		Branded PPT background

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	SPA Quotes list	Welcome to Siebel! This lesson begins on the SPA Quotes list screen.	<i>Before recording, access the SPA Quotes list. Set the predefined queries to show all quotes.</i>	Rectangle		Fill outer area gray, 35% fill transparency	
	"	Click the Queries arrow on the application toolbar.	Click the Queries arrow on the application toolbar.	Arrow	Click box on the Queries arrow with hand mouse cursor		
	"	Select My Division's Quotes .	Select My Division's Quotes .	Arrow	Click box on My Division's Quotes		
	"	The query results appear in the list.		Rectangle			
	"	Details for the first entry appear in the form view below the list.		Rectangle			
	"	You can click a list item to view its corresponding header and detail screens.		Rectangle			
	"	Select 1-XXXXX in the Quote field column.	Select 1-XXXXX in the Quote field column.	Arrow	Click box on 1-XXXXX with hand mouse cursor		
	SPA Quote Header - Line Items view	The SPA Quote Header - Line Items view appears.		Rectangle			
	"	This concludes the Run Predefined Queries lesson.		Rectangle		Fill outer area gray, 35% fill transparency	
	End of Run Predefined Queries lesson	Click Continue to proceed with the Review Techniques for Running Queries lesson. Click Back to return to the Query Functionality lesson menu.			Continue button (goes to Review Techniques for Running Queries lesson overview) Back button (goes to Query Functionality lesson menu)		Branded PPT background
Review Techniques for Running Queries		In Siebel, you can perform a simple query by entering a string of characters. Additionally, you can further narrow your search by using query operators such as *, >, <, etc. In this lesson, you will learn about useful query operators and their functionality. You will access a list, perform a query using several operators, and review the results. Note: You can find a table of query operators and examples in your training guide. Audience: Sales, Global Sales, Marketing, Parker Integrated Partners, Customer Service, Pricing Cell Personnel, Pricing Analyst, Pricing Manager, Marketing Manager, General Manager, and Corporate Marketing			Back button (goes to Menu of Lessons) Continue button (goes to next slide)		Branded PPT background
	SPA Quotes list	Welcome to Siebel! This lesson begins on the Accounts list screen.	<i>Before recording, access the SPA Quotes list.</i>	Rectangle		Fill outer area gray, 35% fill transparency	
	"	Ways to Run a Query There are many ways to run a query from a list view. Roll your mouse over any gold-highlighted field to read more about it. When you are finished, click Continue .	Include rollover captions for each of the following: • Click Query on the list toolbar • Click Query on the form toolbar • Click Query on the application-level menu and select New Query • Click Menu on the list toolbar and select New Query • Click Menu on the form toolbar and select New Query • Press <Alt> + <Q> • Click New Query on the application toolbar		Continue button (goes to next slide)		

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	"	Click Query on the list toolbar.	Click Query on the list toolbar.	Arrow	Click box on Query with hand mouse cursor		
	"	A new gold line appears in the list.		Rectangle			
	"	Type MEGA in the Account field and press <Enter> to execute the query.	Type MEGA in the Account field and press <Enter> to execute the query.	Arrow	Text entry box. Valid entry = MEGA. Hotkey = <Enter>		
	"	Ways to Execute a Query There are many ways to execute a query from a list view. Roll your mouse over any gold-highlighted field to read more about it. When you are finished, click Continue .	Include rollover captions for each of the following: <ul style="list-style-type: none"> Click Go on the list toolbar Click Go on the form toolbar Click Query on the application-level menu and select Run Query Click Menu on the list or form toolbar and select Run Query Press <Alt> + <Enter> Click the Execute Query button on the application toolbar 		Continue button (goes to next slide)	Fill outer area gray, 35% fill transparency	Pause project until user clicks Continue
	"	A list of query results appears.		Rectangle			
	"	Details for the first entry appear in the form view below the list.		Rectangle			
	"	The list of results is very long, so next you will refine your query.					
	"	Ways to Refine a Query There are several ways to refine a query from a list view. Roll your mouse over any gold-highlighted field to read more about it. When you are finished, click Continue .	Include rollover captions for each of the following: <ul style="list-style-type: none"> Click Menu on the list toolbar and select Refine Query Click Menu on the form toolbar and select Refine Query Press <Alt> + <R> Click Query on the application-level toolbar and select Refine Query 		Continue button (goes to next slide)	Fill outer area gray, 35% fill transparency	Pause project until user clicks Continue
	"	Click Menu on the list toolbar.	Click Menu on the list toolbar.	Arrow	Click box on Menu with hand mouse cursor		
	"	Select Refine Query .	Select Refine Query .	Arrow	Click box on Refine Query		
	"	Your current query appears in a gold line.		Rectangle			
	"	Click in the Status field to refine the query by status.	Click in the Status field to refine the query by status.	Arrow	Click box on Status field		
	"	Click the Status arrow that appears.	Click the Status arrow.	Arrow	Click box on Status arrow with hand mouse cursor		
	"	Select Approved .	Select Approved .	Arrow	Click box on Approved with hand mouse cursor		
	"	Click Go to execute the refined query.	Click Go .	Arrow	Click box on Go with hand mouse cursor		
	"	A refined list of query results appears.		Rectangle			
	"	This concludes the Review Techniques for Running Queries lesson.		Rectangle		Fill outer area gray, 35% fill transparency	
	End of Review Techniques for Running Queries lesson	Click Continue to proceed with the Run Query Assistant lesson. Click Back to return to the Query Functionality lesson menu.			Continue button (goes to Run Query Assistant lesson overview) Back button (goes to Query Functionality lesson menu)		Branded PPT background

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	Run Query Assistant	<p>The query assistant is a dialog box in which you can enter up to four lines of criteria to narrow your search results.</p> <p>In this lesson, you will access a list in Siebel, use the query assistant to perform a complex query, and review the results of your search.</p> <p>Audience: Sales, Global Sales, Marketing, Parker Integrated Partners, Customer Service, Pricing Cell Personnel, Pricing Analyst, Pricing Manager, Marketing Manager, General Manager, and Corporate Marketing</p>					Branded PPT background
	Accounts List	Welcome to Siebel! This lesson begins on the SPA Quotes list screen.	<i>Before recording, access the Accounts list.</i>	Rectangle		Fill outer area gray, 35% fill transparency	
	"	Click Query on the list toolbar.	Click Query on the list toolbar.	Arrow	Click box on Query with hand mouse cursor		
	"	A new gold line appears in the list.		Rectangle			
	"	Click Query Assistant on the list toolbar.	Click Query Assistant on the list toolbar.	Arrow	Click box on Query Assistant with hand mouse cursor		
	Query Assistant dialog box	The Query Assistant dialog box appears.		Rectangle			
	"	First, you will choose the fields to query.		Rectangle			
	"	Click the first Select Field arrow.	Click the first Select Field arrow.	Arrow	Click box on the first Select Field arrow with hand mouse cursor		
	"	Select Account Type .	Select Account Type .	Arrow	Click box on Account Type with hand mouse cursor.		
	"	Click the second Select Field arrow.	Click the second Select Field arrow.	Arrow	Click box on the second Select Field arrow with hand mouse cursor		
	"	Click the down scroll arrow.	Click the down scroll arrow until you reach the State option.	Arrow	Click box on the down scroll arrow		
	"	Select State .	Select State .	Arrow	Click box on State with hand mouse cursor		
	"	Next, you will choose the query operators.		Rectangle			
	"	Click the first Starts With arrow.	Click the first Starts With arrow.	Arrow	Click box on the first Starts With arrow		
	"	Select Equals .	Select Equals .	Arrow	Click box on Equals with hand mouse cursor		
	"	Click the second Starts With arrow.	Click the second Starts With arrow.	Arrow	Click box on the second Starts With arrow with hand mouse cursor		
	"	Select Does not Equal .	Select Does not Equal .	Arrow	Click box on Does not Equal with hand mouse cursor		
	"	Finally, you will type the values to search for.		Rectangle			
	"	Type Direct Customer in the first field in the right column and then press <Tab>.	Type Direct Customer in the first field in the right column and then press <Tab>.	Arrow	Text entry box. Valid entry = Direct Customer. Hotkey = <Tab>		
	"	Type OH in the second field in the right column and then press <Tab>.	Type OH in the second field in the right column and then press <Tab>.	Arrow	Text entry box. Valid entry = OH. Hotkey = <Tab>		

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	"	Click Go to execute the query.	Click Go .	Arrow	Click box on Go with hand mouse cursor		
	Accounts List	The query results appear in the list.		Rectangle			
		For this sample, the Account Type column only shows records for Direct Customer accounts.		Arrow			
		The State column excludes all Ohio accounts.		Arrow			
	"	This concludes the Run Query Assistant lesson.		Rectangle		Fill outer area gray, 35% fill transparency	
	End of Run Query Assistant lesson	Click Continue to proceed with the Save a Query and Delete a Saved Query lesson. Click Back to return to the Query Functionality lesson menu.			Continue button (goes to Save a Query and Delete a Saved Query lesson overview) Back button (goes to Query Functionality lesson menu)		Branded PPT background
<p>Save a Query and Delete a Saved Query</p> <p>In Siebel, you can associate queries to your logon for future use. You can also delete them at any time if you no longer need to use them. The list of pre-defined queries may contain queries that you did not create (they already existed in the system). If this is the case, you may only delete queries that you have created.</p> <p>In this lesson, you will create and run a query, save it, review it in the Predefined Queries list, and then delete it.</p> <p>Audience: Sales, Global Sales, Marketing, Parker Integrated Partners, Customer Service, Pricing Cell Personnel, Pricing Analyst, Pricing Manager, Marketing Manager, General Manager, and Corporate Marketing</p>							
	Accounts List	Welcome to Siebel! This lesson begins with the results of a query that has already been performed for quotes with a status of Submitted .	<i>Before recording, perform a query.</i>	Rectangle		Fill outer area gray, 35% fill transparency	
		Click Query on the application-level menu.	Click Query on the application-level menu.	Arrow	Click box on Query with hand mouse cursor		
		Select Save Query As .	Select Save Query As .	Arrow	Click box on Save Query As		
		The Save Query As dialog box appears.		Rectangle			
		Type Submitted Quotes in the Query Name field and click OK .	Type Submitted Quotes in the Query Name field and click OK .	Arrow	Text entry box on Query Name field. Valid value = Submitted Quotes . Hotbutton = OK.		
		The Submitted Quotes query now appears in the list of predefined queries.		Arrow			
		Click Query on the application-level menu.	Click Query on the application-level menu.	Arrow	Click box on Query with hand mouse cursor		
		Select Delete Saved Query .	Select Delete Saved Query .	Arrow	Click box on Delete Saved Query		
		The Delete Record dialog box appears.		Rectangle			
		Select Submitted Quotes .	Select Submitted Quotes .	Arrow	Click box on Submitted Quotes		
		Click OK .	Click OK .	Arrow	Click box on OK with hand mouse cursor		

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		The query no longer appears in the predefined query list.		Arrow			
		This concludes the Save a Query and Delete a Saved Query lesson.		Rectangle		Fill outer area gray, 35% fill transparency	
	End of Save a Query and Delete a Saved Query lesson	Click Continue to proceed with the Export Query Records to a File lesson. Click Back to return to the Query Functionality lesson menu.			Continue button (goes to Export Query Records to a File lesson overview) Back button (goes to Query Functionality lesson menu)		Branded PPT background
Export Query Records to a File		After you have run a query in Siebel, you can export the list of results to a file. You have the options to export a single row or multiple records, export specific or all columns, and delimit the file with commas or tabs. In this lesson, you will export query data to a tab-delimited file, and view the exported data in Excel. Audience: Sales, Global Sales, Marketing, Parker Integrated Partners, Customer Service, Pricing Cell Personnel, Pricing Analyst, Pricing Manager, Marketing Manager, General Manager, and Corporate Marketing		Back button (goes to Menu of Lessons) Continue button (goes to next slide)		Branded PPT background	
	Accounts List	Welcome to Siebel! This lesson begins with the results of a query that has already been performed.	<i>Before recording, perform a query that returns fewer than 100 results.</i>	Rectangle		Fill outer area gray, 35% fill transparency	
	"	To export the results of the query, click Menu in the list toolbar.	Click Menu on the list toolbar.	Arrow	Click box on Menu with hand mouse cursor		
	"	Select Export .	Select Export .	Arrow	Click box on Export with hand mouse cursor		
	Export dialog box	The Export dialog box appears.		Rectangle			
	"	Review the options. For this example, the default settings are acceptable.		Rectangle			
	"	Click Next .	Click Next .	Arrow	Click box on Next with hand mouse cursor		
	File Download dialog box	The File Download dialog box appears.		Rectangle			
	"	Click Open .	Click Open .	Arrow	Click box on Open with hand mouse cursor		
	Microsoft Excel	Microsoft Excel launches, and displays the data you selected.		Rectangle			
		You can save or print the spreadsheet.		Rectangle			
		Click the X to close Excel.	Click the X to close Excel.	Arrow	Click box on the X		
		The Export dialog remains open so you can perform additional exports.		Rectangle			
		Click Close to return to the query results in Siebel.	Click Close	Arrow	Click box on Close with hand mouse cursor		
		This concludes the Export Query Records to a File lesson.		Rectangle		Fill outer area gray, 35% fill transparency	

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	End of Export Query Records to a File lesson	<p>This concludes the Query Functionality tutorial.</p> <p>Click Continue to close this tutorial and go to the Order Management Implementation Site.</p> <p>Click Back to return to the Query Functionality lesson menu.</p>			<p>Two buttons:</p> <p>Continue to the Order Management Implementation Site (http://forums/sites/NewOrderMgmt/Implementation/default.aspx)</p> <p>Back to the Query Functionality lesson menu</p>		Branded PPT background