Order Management

Desktop Readiness Guidelines

ENGINEERING YOUR SUCCESS.

Order Management:
Desktop Readiness Guidelines

Parker Hannifin Corporation

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Siebel

Overview

These guidelines explain how to download and set up your browser, and troubleshoot if you have a specific issue in Siebel. If you are still experiencing problems with Siebel after using this guide, submit a ticket to the Corporate Service Desk at **sdg@parker.com**.

Web Browser Setup

To access Siebel 15 and above, complete the applicable checklist items in this section:

- "Verify Web Browser Setup" on page 2
- "Remove Toolbars" on page 3
- "Disable Pop-Ups" on page 4
- "Check Internet Explorer <Tab> Setting" on page 4
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- "Set Up Internet Options - Security and Advanced Settings" on page 5
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- "Set Browser Option Settings – Firewall or Proxy Server Settings" on page 7
- "Check Your Siebel Access" on page 8

Note that when you complete any of the above items in Internet Explorer, the changes will also apply in Google Chrome.

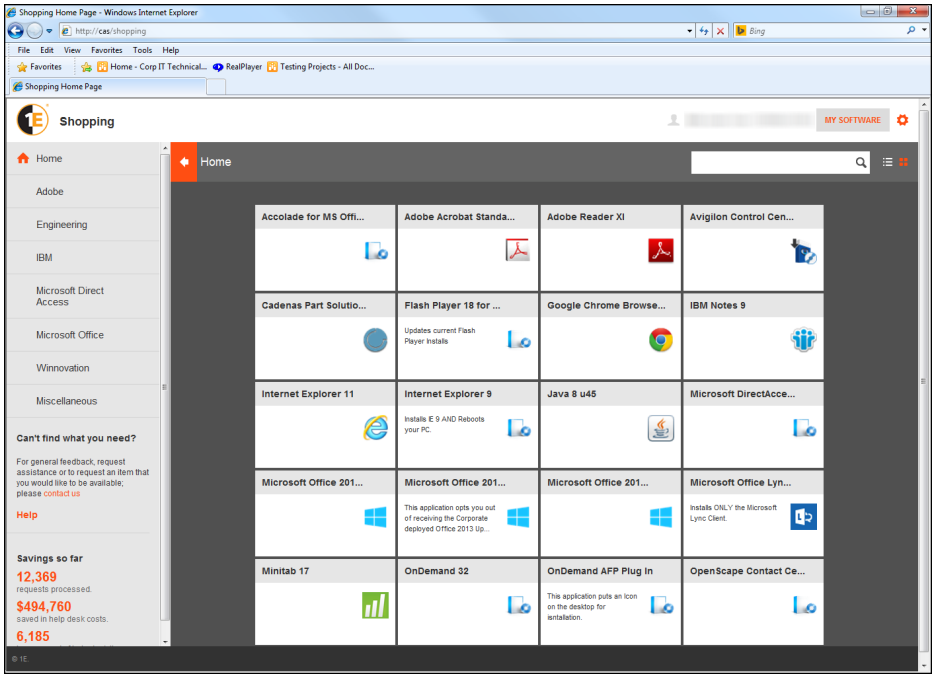
☐ Verify Web Browser Setup

Parker supported web browser versions for Siebel 15 and above:

- Microsoft Internet Explorer 11
- Google Chrome 25 and later

1. If you do not have one of the above browsers, open http://cas/shopping to download one.

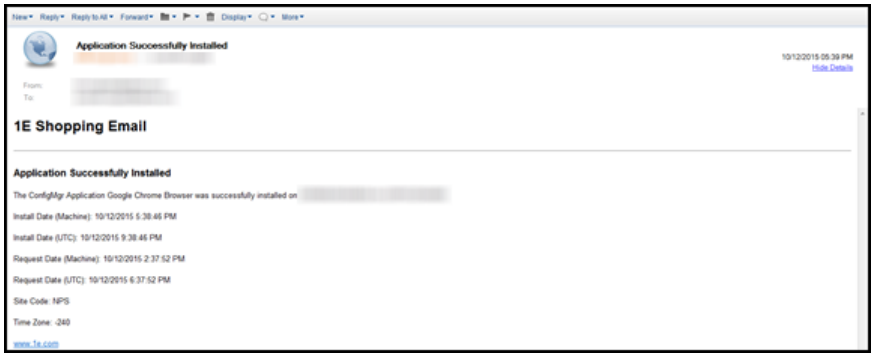
   If you cannot update to Internet Explorer 11 due to other application requirements, then download Google Chrome.



Shopping Home Page

2. Hover over **Google Chrome Browser** or **Internet Explorer 11,** then click on the **Request** button that appears.

   The browser will install automatically usually within 3-5 hours, but sometimes it can take up to 24 hours. You will receive an e-mail when it is installed.



Sample successful installation email

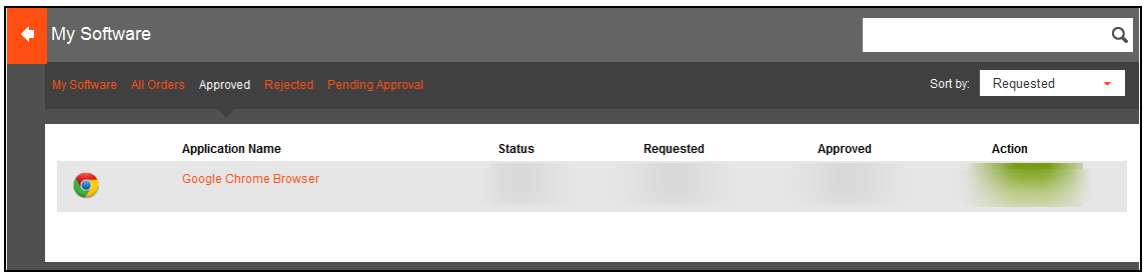
3. When the browser has loaded, verify that it is available in your programs list through your Start menu, open it, then try to open Siebel.

4. **IMPORTANT:** If it does not download within 24 hours, or you receive an 'installation failed' e-mail, check the status through the Shopping Home Page:

   a. On the Shopping Home Page, click **My Software** in the top right corner of the page.

My Software

   b. Check the status for the order.



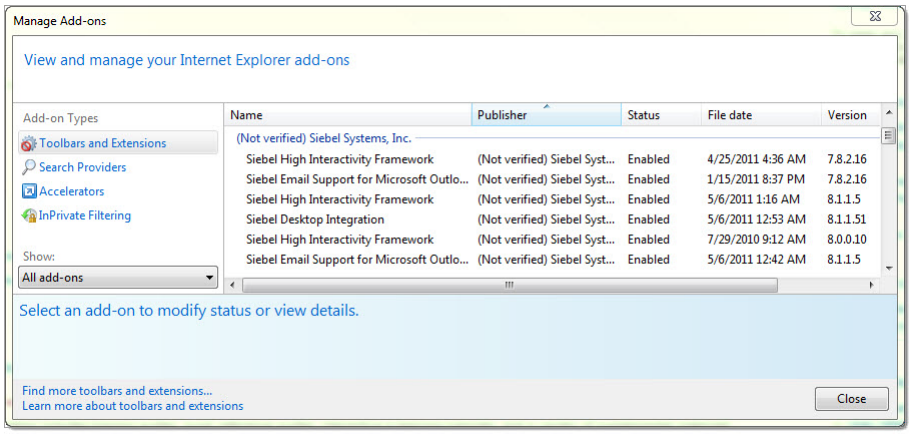
Order Status

   c. If the status is anything other than **Installed**, submit a ticket to the Corporate Service Desk at sdg@parker.com and request to have it assigned to **PC Support - Corporate**.

☐ **Remove Toolbars**

Remove toolbars, such as the Google Toolbar, to maximize your screen real estate space.

1. On the browser toolbar, click **Tools** > **Manage Add-ons**.
2. From the **Show** drop-down menu, click **All Add-ons**.
3. Check if there are any third-party toolbars enabled (for example, Google, Yahoo, etc.). If so disable or remove the toolbar(s).

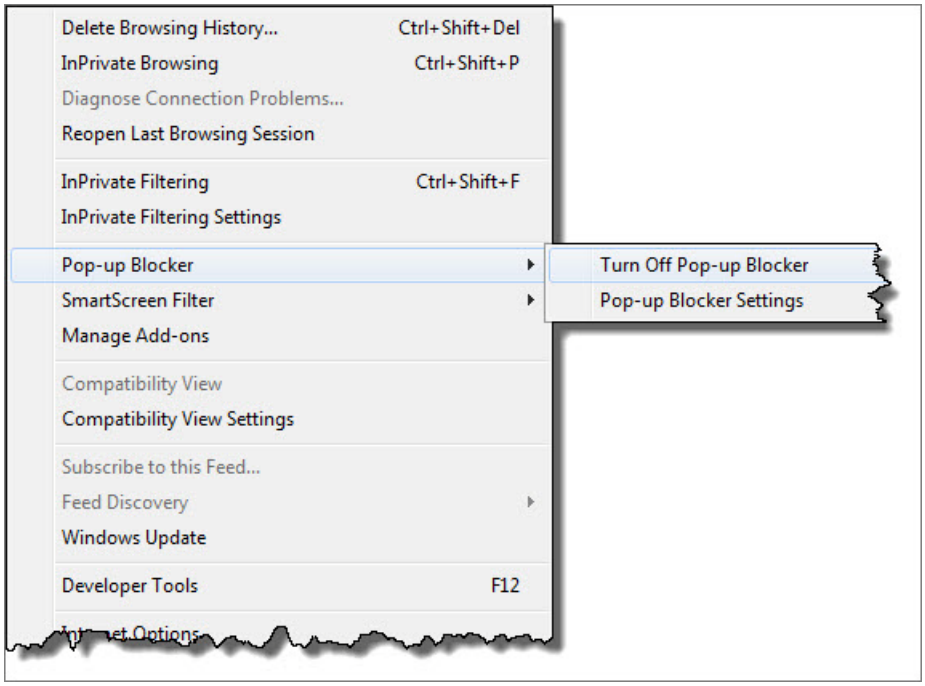


Manage Add-Ons Dialog Box

4. Close the Manage Add-Ons dialog box.

☐ Disable Pop-Ups

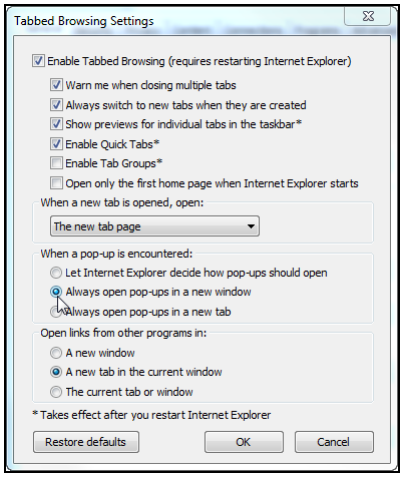
1. On the browser toolbar, click **Tools** > **Pop-up Blocker** > **Turn Off Pop-up Blocker**.



Turn Off Pop-up Blocker Selection

☐ Check Internet Explorer <Tab> Setting

1. On the browser toolbar, click **Tools** > **Internet Options**.
2. On the General tab, click **Tabs** in the Tabs section.



Tabbed Browsing Settings Dialog Box

3. Select **Always open pop-ups in a new window** in the 'When a pop-up is encountered:' section.
4. Click **OK** to save your selection.
5. Click **Apply** > **OK** to close the Internet Options dialog box.

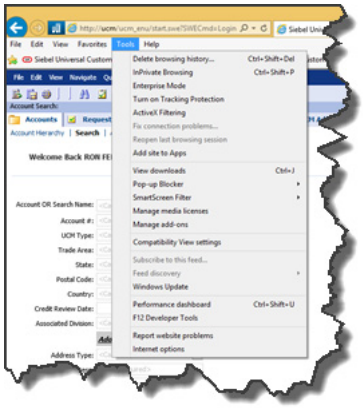
☐ Disable Enterprise Mode (Internet Explorer Only)

If you have Enterprise Mode enabled in Internet Explorer, disable it. You will see the buildings icon if Enterprise Mode is enable in the URL line.

Enterprise Mode Buildings Icon

To disable Enterprise Mode in Internet Explorer:

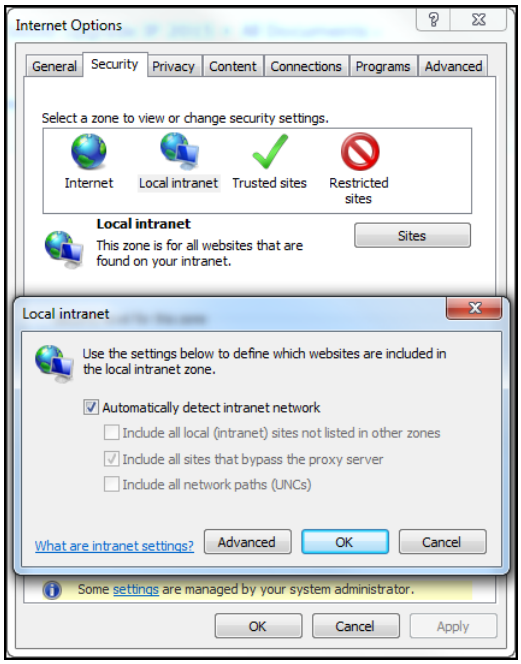
1. In the browser navigation bar, click **Tools**.
2. Clear the check mark next to **Enterprise Mode**.



Tools > Enterprise Mode

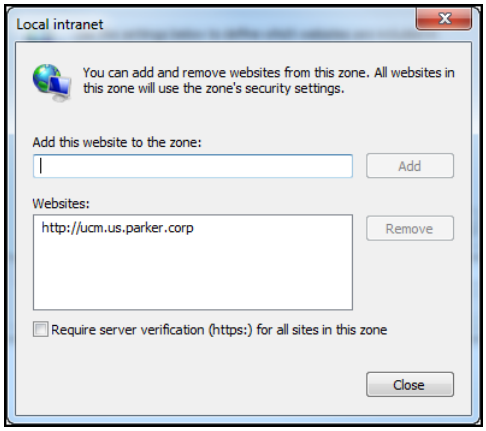
☐ Set Up Internet Options - Security and Advanced Settings

1. On the browser toolbar, click **Tools** > **Internet Options**.
2. On the Security tab, click **Local Intranet** > **Sites**.



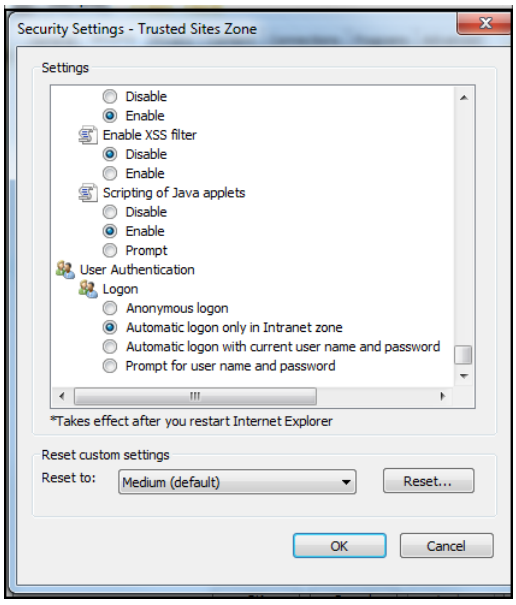
Local Intranet > Sites Selection

3. Verify that the **Automatically detect Intranet network** check box contains a check mark, and click **Advanced**.
4. Add **http://omprodweb.us.parker.corp** to the Websites list, click **Close** and **OK** to return to the Internet Options dialog box.



Local Intranet Websites

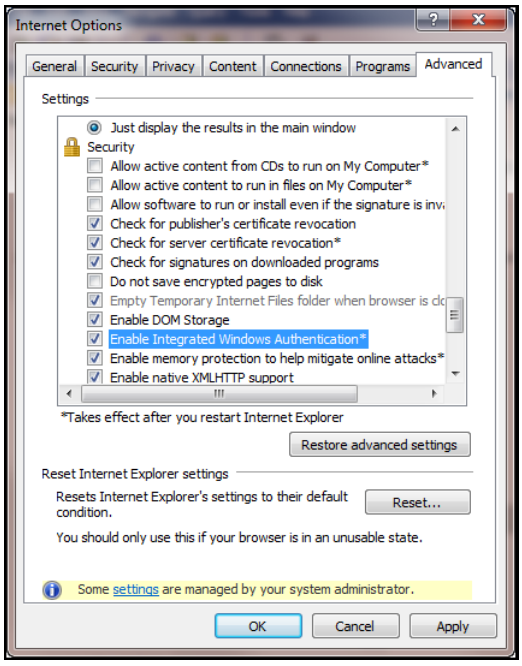
5. Click **Trusted Sites** > **Custom Level**.



Security Settings – Trusted Sites Zone Dialog Box

6. Verify/update settings:
   - Set **User Authentication** to **Automatic logon in Intranet zone**.
   - Keep the default settings for all of the other settings in this list.
7. Click **OK** to return to the Internet Options dialog box.

8. Click the **Advanced** tab.



Advanced Tab

9. Verify that the **Enable Integrated Windows Authentication** contains a check mark.
10. Click **Apply** > **OK** to close the Internet Options dialog box

☐ **Disable Script Debugging**

Script debugging is typically enabled automatically by Microsoft Visual Studio products. To improve the performance of the Web browser with the Siebel applications, you must disable script debugging in the Internet Explorer browser.

1. On the browser toolbar, click **Tools** > **Internet Options**.
2. In the Internet Options dialog box, click the **Advanced** tab.
3. In the Browsing section, click **Disable script debugging**.
4. Click **Apply > OK** to close the Internet options.

☐ **Set Browser Option Settings – Firewall or Proxy Server Settings**

To correctly configure for use with proxies, the proxy must be bypassed for the local host.

1. On the browser toolbar, click **Tools** > **Internet Options** > **Connections** > **Local Area Network (LAN) settings**.
2. In the Local Area Network (LAN) Settings dialog box:
   a. Click the **Use a proxy server for your LAN** check box.
   b. Enter the proxy details.
   c. Click the **Bypass proxy server for local addresses** check box.
   d. Click **OK**.
3. Click **Apply > OK** to close the Internet options.

☐ **Check Your Siebel Access**

After you have completed all of the applicable checklist items in this Web Browser Setup section, open a new browser window, and try to open Siebel 15 or above to see if your access is OK.

☐ **Submit a Service Desk Ticket**

If you are still experiencing issues after trying the browser set up options, submit a ticket to the Corporate Service Desk at **sdg@parker.com**.

Siebel Setup

☐ **Set Up to Use Siebel Send E-Mail Functionality**

To see the templates in the **Body** drop-down when sending an e-mail in Siebel, you need to set up your outbound communications settings.

1. Click > **Settings** > > **Outbound Communications**.

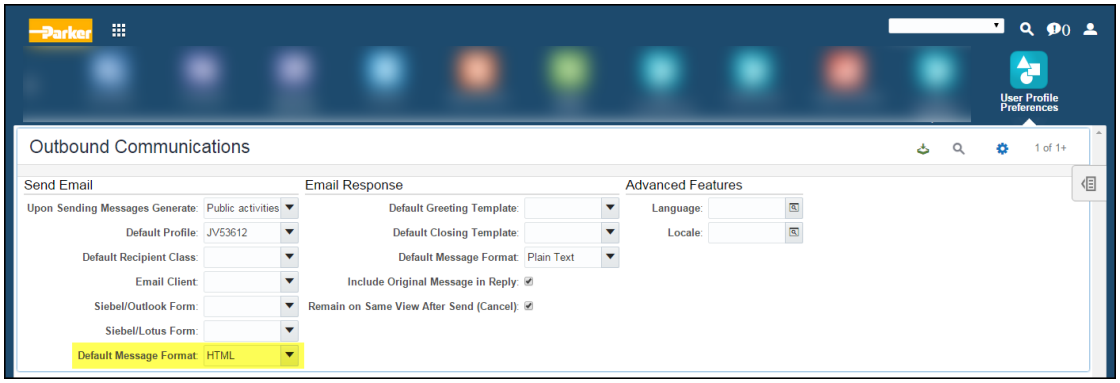


Figure 1: Outbound Communications View with sample data

2. Set the **Default Message Format** to **HTML**.
3. Click **Save**.
4. Log out of Siebel to save and apply your preferences.