# Access and Navigation

## Customer Relationship Management Quick Reference Guide

Use the processes defined in this quick reference guide to learn how to access and navigate Siebel CRM.

To use the Siebel application identified in this guide and perform the lessons, you will need to access the application using the applicable URL address, user ID/name, and password.

## Review Siebel User Interface

### Siebel User Interface - Language

The Siebel application user interface is available in English.

### Understand the Siebel Home Page

The Siebel Home Page in CRM is your starting point for reviewing and creating activities ❶, opportunities ❷, and contacts ❸. Scroll down the Siebel Home Page to view a calendar.

### Understand the Icons Available on All Siebel Screens

❹ Use to access the Site Map, start a new query, execute a query, access iHelp, etc.

❺ Click to view Settings, such as user profile, tab layout, change position, etc., and to logout.

❻ Select a screen tile to access the top-level screens in Siebel.

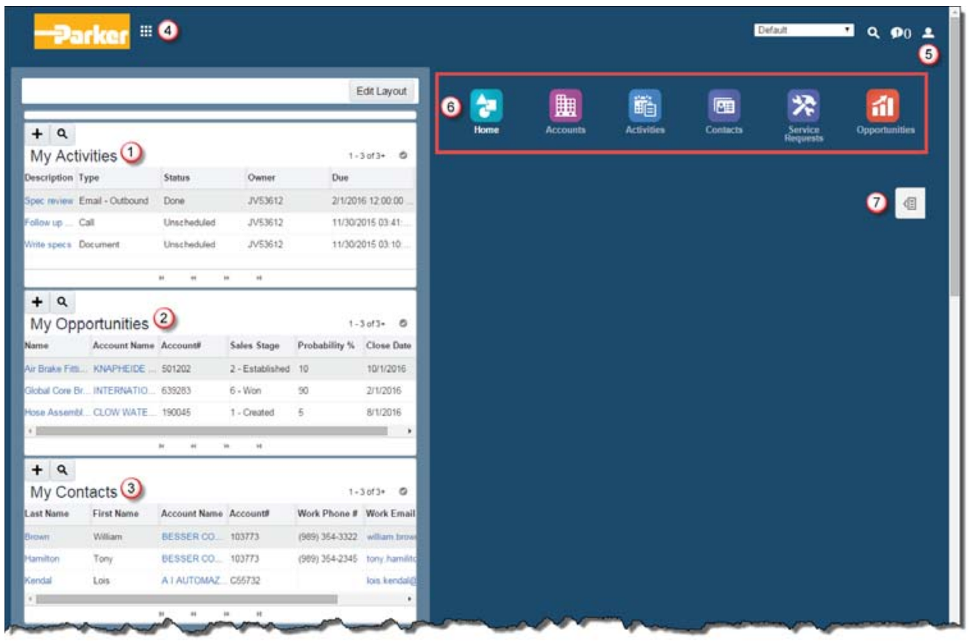
❼ Click the second-level view bar to access sub-level views in top-level screens.

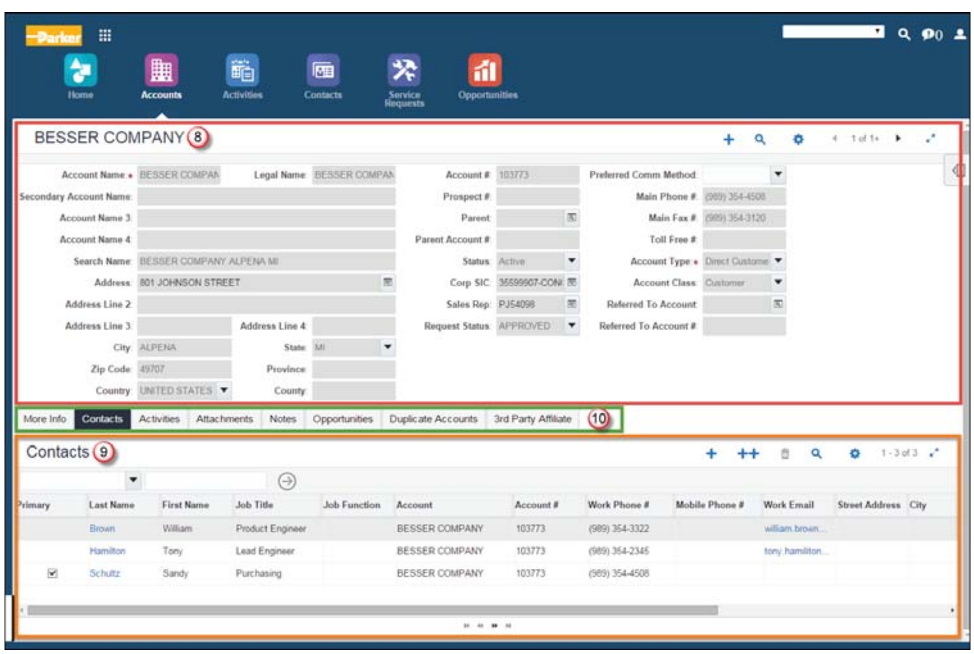
### Understand the Siebel User Interface

❽ A form view contains information for a single record.

❾ A list view contains one or more rows of records.

❿ View tabs contain additional information about a selected record.



## Review Siebel Icons

### Icons in Lists and Forms

Click to display menu options, such as running queries, counting records, adjusting columns displayed, etc.

Click to create a new record. In instances when you see the + and ++ in a view, the + means to add an existing record (for example, to add an existing contact record to an account).

In instances when you see the + and ++ in a view, the ++ means to create a new record (for example, to create a new contact record for an account).

Click to save a record or your work. This may not commonly appear, and stepping off a record still saves your work when this icon is not visible.

Click to delete a record. If the icon is gray, then it is not active.

Click to cancel your modifications to the selected record.

1 - 10 of 10+ Appears when there is more than one record in a view.

### Queries Icons

Click to start a new query. Enter search criteria into any of the applicable fields in the list or form view.

Click to execute a query.

Click to launch the query assistant.

Click to cancel a query.

### Icons to Expand and Collapse Lists

Click to expand a list to display more records, or expand a form to display more fields.

Click to collapse a list to display fewer records, or collapse a form to display fewer fields.

### Icons to Navigate Between Records in a List

Use these arrows to navigate to the previous or next record in the list, respectively.

Use these arrows to navigate to the previous or next record set in the list, respectively.

### Field Control Icons

Select to expand or collapse a text entry box. If you are entering a lot of text, this allows you to view it all together.

Click to open a dialog box and select one entry for the field.

Click to open a dialog box and select one or more entries for the field.

Click to launch a currency calculator for the field.

Click to open a calculator and enter an amount into a field.

Click to open a calendar and enter a date into a field.

Click to select a single value from a list for the field entry.

## Log On to Siebel

1. Access the Siebel application using the URL provided.

   *The Siebel test and production environments rely on Active Directory account security for user authentication (verifying the user). To access the application, you must log on to your workstation PC or through VPN using your active network log on ID and password, and be on Active Directory. When Active Directory verifies your logon information, you will see the Siebel Home Page.*
2. If you log off of Siebel, enter your Active Directory logon ID and password to access Siebel again.

## Log Off from Siebel

If you do not log off from the application using one of the options below, the system may not recognize that you exited.

**Option 1:** Click > .     **Option 2:** Click **> Logout**.

## Reset an Expired AD Password

To reset an expired AD password, contact the applicable Help Desk.

**Corporate Help Desk - Cleveland, OH**
Toll Free: 1-888-795-4357
Local: 216-896-4357

**Intl. Service Desk - Hemel Hempstead, UK**
(+44) 1442 458 208

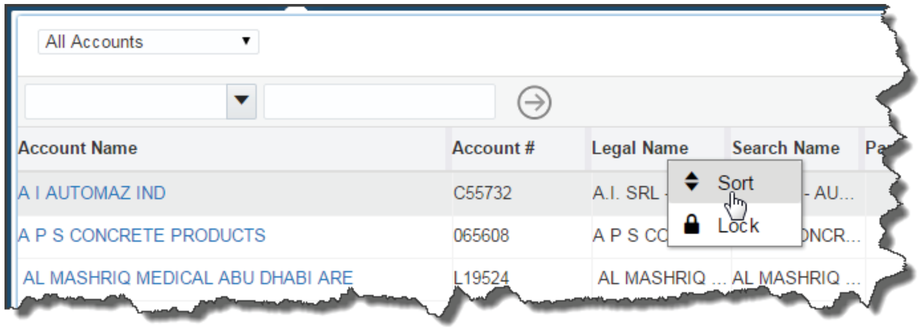
**Aerospace Service Desk - Irvine, CA**
Toll Free: 1-866-940-4911
Local: 949-465-4357

**Global Service Desk E-mail**
servicedeskglobal@parker.com

AD passwords must be changed every 90 days, and reset if you do not log on at least once every 90 days.

## Review Siebel List Sorting Functions

1. Click a column heading to open the Sort / Lock option.
2. Click **Sort** to sort the column in ascending order. Click **Sort** again to sort the column in descending order.




## Review User Profile Preferences

1. If the User Profile Preferences screen tile is not on the screen, click > **Settings** > > **Profile** to open the User Profile.
2. Click next to **Saved Queries** in the upper right corner, and select **SWLS**.
3. In this view, you can review your user profile information.
4. Click , then log off to apply your preferences.

## Review Outbound Communications Settings

1. If the User Profile Preferences screen tile is not on the screen, click > **Settings** > > **Outbound Communications** to open Outbound Communications.
2. Populate the following settings to allow Siebel to interact with IBM Notes:
   - **Email Client**: Set to **External Email Client**.
   - **Default Message Format**: Set to **HTML.**
3. Click , then log off to apply your preferences.

## Review Siebel Menu ( ) Options

### Run Queries

Click **New Query** to create a new query, **Run Query** to run the query, and **Refine Query** to refine the criteria in the query.

### Copy a Record

To create a new record from an existing one, access and select a record, and click **Copy Record**. Make changes, and click off the record to save. This only works in some views.

### Count Records After Running Queries

After running a query, click **Record Count** to have Siebel count the number of records generated, and display this count in the Record Count dialog box.

### Select/Organize Your Columns in a List

Click **Columns Displayed** to open a dialog box for the list view and review all available columns, select which columns to display, and define the order to display the columns. To reset the columns displayed to the default settings, click **Reset Defaults** in the Columns Displayed dialog box.

### Export Record to Excel

Click **Export** to export the records in your list view to Excel.

## Set Layout Preferences

In Siebel, you can define the layout for the screen tabs (tiles) and view tabs on your user interface.

1. If the User Profile Preferences screen tile is not on the screen, click > **Settings** > > **Tab Layout** to open the Screen Tab (Tile) Layout - View Tab Layout.
2. On the Screen Tab (Tile) Layout:
   - Select the order for how to display your screen tiles on the user interface.
   - Select whether to show or hide a screen name tile.
3. When a screen tile is highlighted, the available views appear in the View Tab Layout where you can:
   - Select the order for how to display your view tabs.
   - Select whether to show or hide a view tab name.
4. Select which view tab to make the default view when you first access the respective screen tile in the user interface. There can only be one default view per screen tile. To select your default view tab, select the **Default View** field column check box.

## Change Positions

1. If the User Profile Preferences screen tile is not on the screen, click > **Settings** > > **Change Position** to open the Change Position list.
2. Select (highlight) the position.
3. Click **Change Position.**
   *Your user ID is now associated to the selected position.*