

Distributor GTS Portal Overview

Siebel V8 Upgrade

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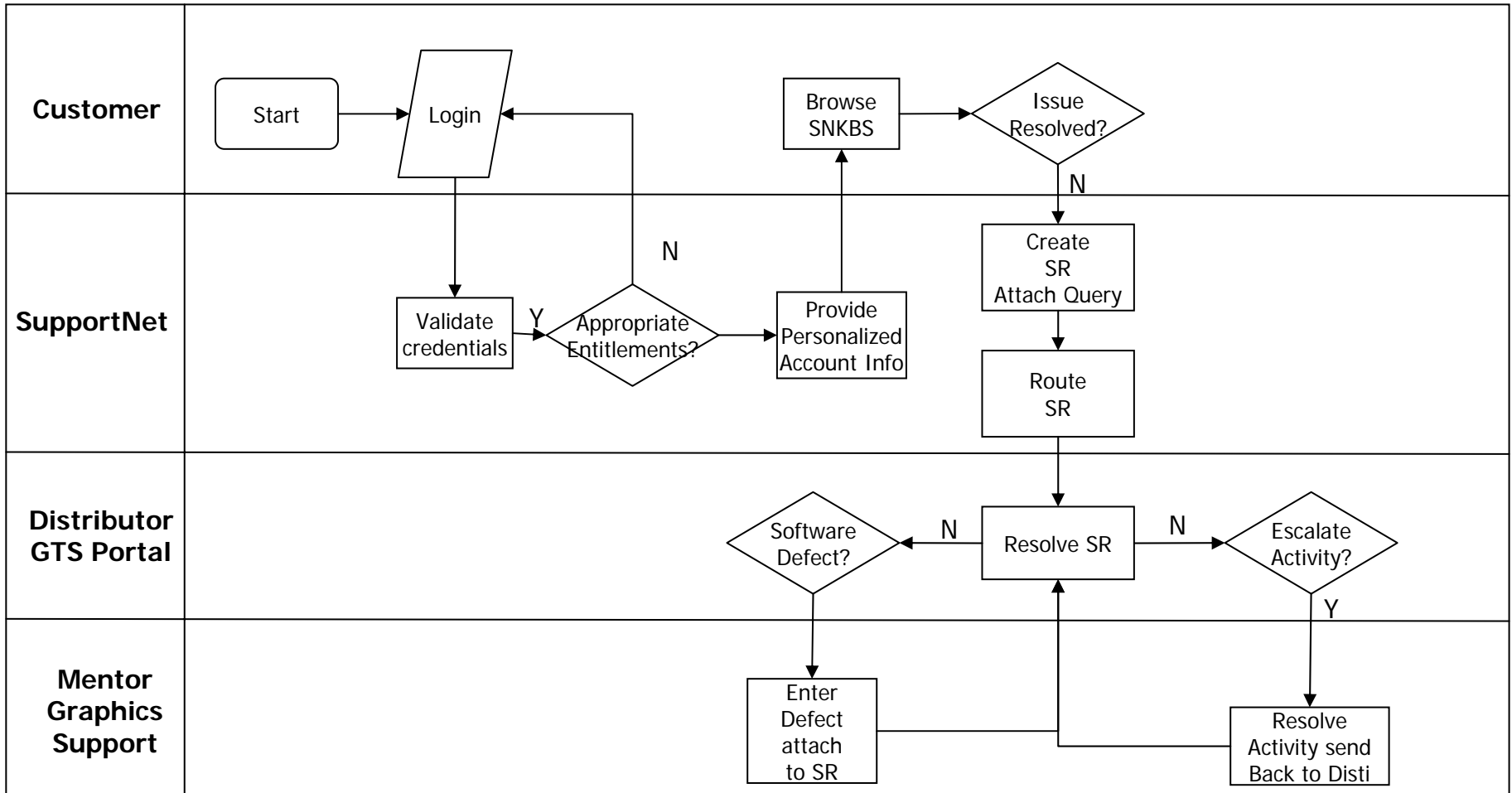
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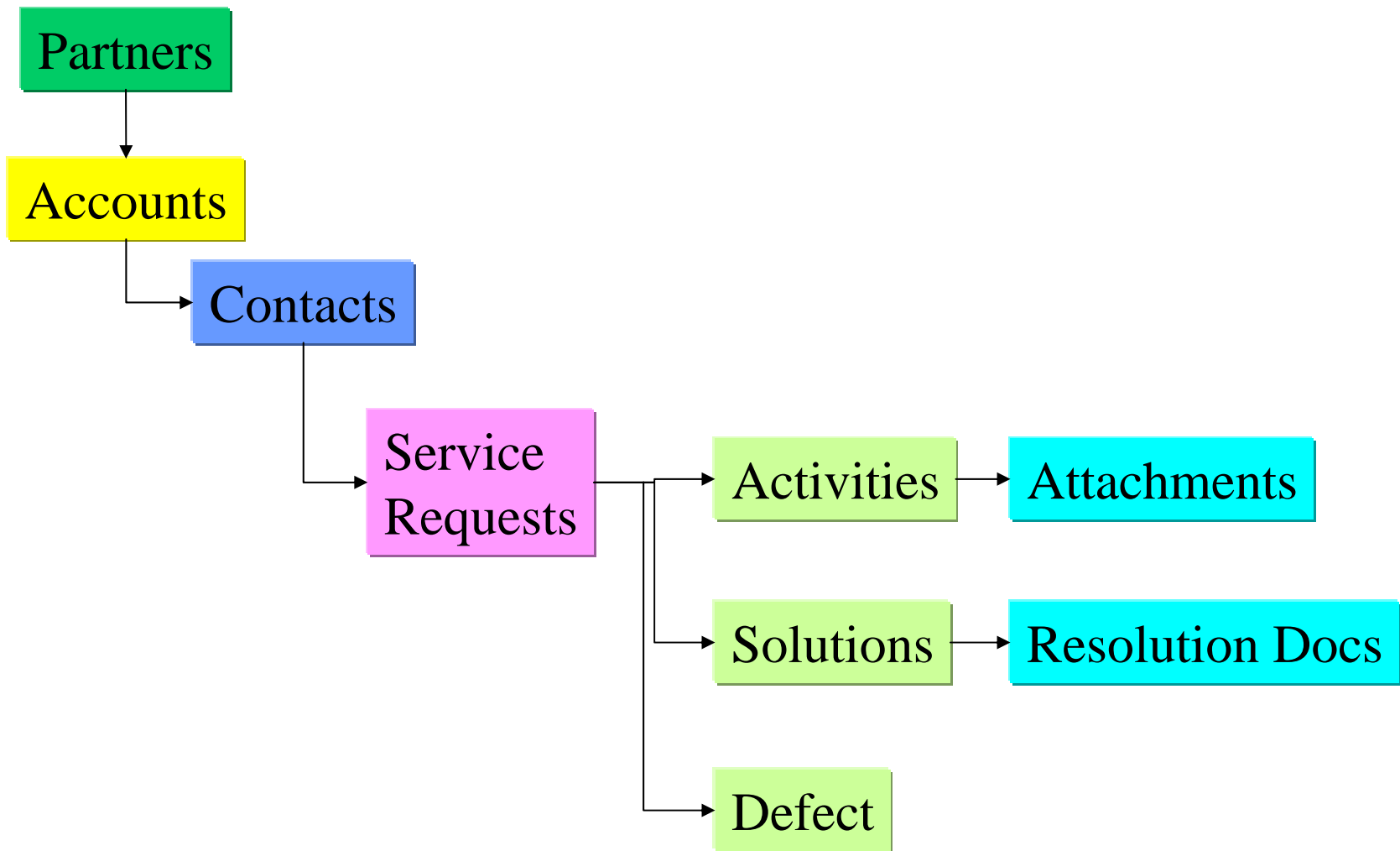
Mentor
Graphics®

Use Scenarios

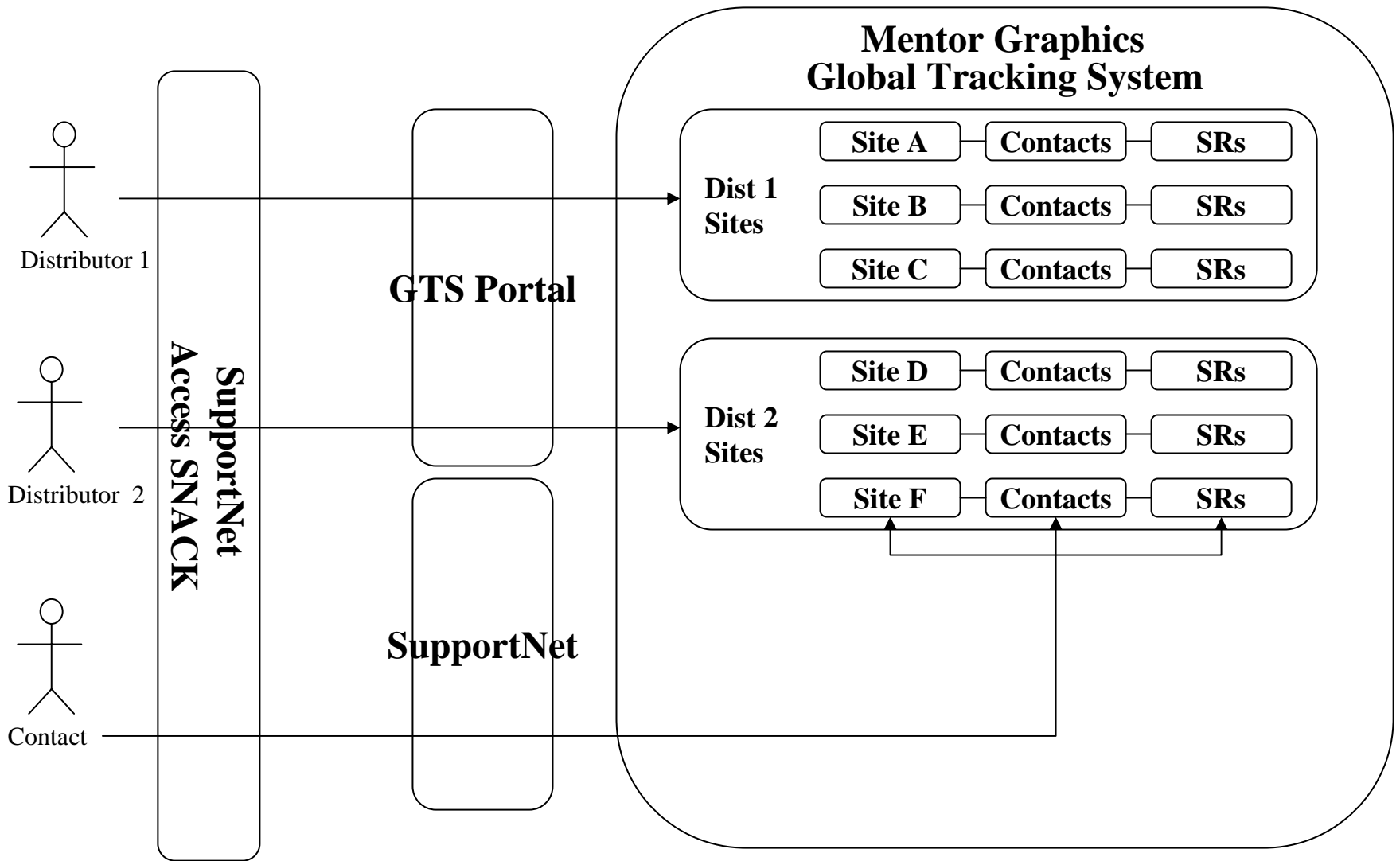
- **The following use cases will be implemented:**
 1. **Distributor can manage SRs and activities for their responsible sites**
 2. **Distributor can view new SRs and activities for their responsible sites**
 3. **Distributor can add a Contact to a responsible site.**
 4. **Distributor customers can log SRs through SupportNet**

Siebel Distributor Flow





Distributor SupportNet Access



Authenticate through SupportNet first



Login

Please enter your user name and password to login.

User Name:

Password:

Remember my user name and password on this computer

LOG IN

Login to GTS

Set “Remember my User ID and Password”

ORACLE® Siebel Customer Relationship Management

GTS Production 8.0

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User ID:

Password:

Remember my User ID and Password

Update your User Preferences

The screenshot shows the Oracle User Profile page for a user named Steve Guntow. The page is divided into two main sections: 'User Information' and 'Other'. The 'User Information' section contains fields for Name, Title, User ID (STEVE_GUNTOW), Password, Verify Password, Email, Time Zone (GMT-08:00) Pacific, Mobile Phone #, Home Phone #, Work Phone # (9786583800), Fax # (steve_guntow), Pager #, Pager PIN, and Manager. The 'Other' section contains fields for Position (MGC DISTI - Trilogic), Responsibilities (MGC Partner Portal), CQ Login, CQ Password, Inquire Login, Inquire Password, Snet Login, and Snet Password. A yellow highlight is placed over the 'Other' section, and the text 'MGC Only Use' is overlaid in red on the 'Other' section.

* Indicates required Fields

- 1) Update your password
- 2) Select your Manager
- 3) Check your email address
- 4) Update any other information

Partner Portal versus the new GTS Portal

Mentor Graphics SUPPORTNET PARTNER PORTAL

Service Requests | **SR Detail** | Accounts | Account Detail | Contacts | Contact Detail | Activities | Solutions | My Profile

[Contribute to Supportnet KnowledgeBase](#) | [Search SupportNet KnowledgeBase](#) | [Find SR](#) | [Support Survey](#) | [Quick Search](#)

My Current Service Requests (last 30 days)				Partner Home
SR #	Account	Contact Last Name	Short Desc	
My Current Activities				
Activity #	Activity Type	Status	Open Date	Description

Quick Search

Search for:

In:

TABS (Service Requests, SR Detail, Accounts, Account Detail, Contacts, Contact Detail, Activities, Solutions, My Profile)

VIEW LINKS (Contribute to Supportnet KnowledgeBase, Search SupportNet KnowledgeBase, Find SR, Support Survey, Quick Search)

RECENT RECORDS (My Current Service Requests, My Current Activities)

File Edit View Navigate Query Tools Help

Service Activities Solutions Accounts Contacts

SR Home | SR List | **SR Detail** | SR Candidates | SR History

Search

SR #:

Site ID:

Account:

Last Name:

First Name:

Owner:

Area:

QUICK SEARCH

ORACLE

Saved Queries:

Frequently Viewed Service Requests

Recent Records

- 1-19810701 -- Harish Kumar
- 2182016961 -- David Drury
- 1-110760901 -- Ed Joy
- 1-110028501 -- Victor Mucante
- 1-10797601 -- John Natusch

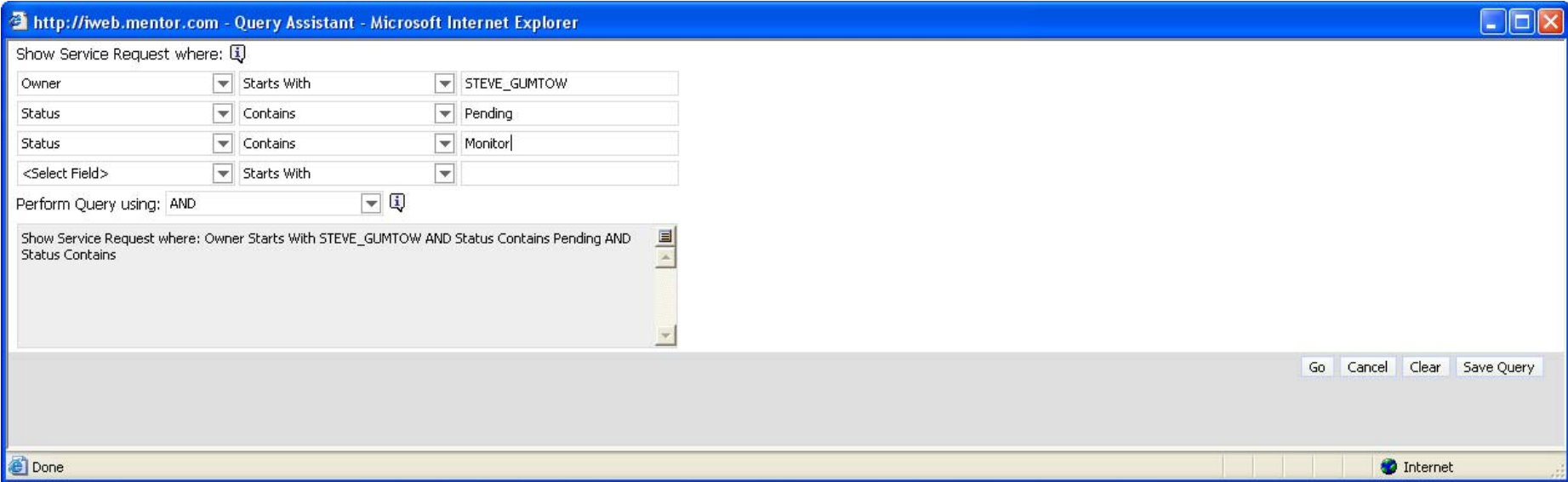
New in GTS Portal

Personalizing your views

The screenshot displays the Oracle Service Requests interface. The top navigation bar includes 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The 'Service Requests' section shows a list of requests with columns for 'Root SR Number', 'Account', 'First Name', 'Last Name', 'Symptom(s)', 'Status', 'SR Modified Date', 'Open Date', and 'Defect #'. A red circle highlights the 'Query' button in the list view's toolbar. An arrow points from this circle to a detailed view of a specific request (SR #: 1-19810701). In this detailed view, the 'Query Assistant' button is highlighted with a red circle. The detailed view includes fields for 'Contact' (Site ID, Account, Last Name, First Name, Reply, Eng OK?, Time Zone, Resp. Region, Phone, Email) and 'Description' (Product, Area, Version, Platform, Target, O/S Ver, Serial #, Alt Info, Symptoms). The bottom section shows 'Activities' with a table of recent actions.

Activity #	Comments	Created	Created By Email	Created By	Description
1-306KY2	Closed MGC SR auto-notification	2008-09-07 12:47:21	sr_bounces#mentor.com	SADMIN	Closed MGC SR auto-

Build a query



Saving a query

http://iweb.mentor.com - Query Assistant - Microsoft Internet Explorer

Show Service Requests where:

Owner

Status

<Select Field>

<Select Field>

Perform Query using:

Show Service Requests where: Owner Equals STEVE_GUMTOW AND Status Does not Contain

Save Query

http://iweb.mentor.com - Save Query As - Micros...

Query Name

*Steve's Pending and Monitor SRs
Unassigned SR's

OK Cancel

Using a query

The screenshot shows the Oracle Service Requests application interface. At the top, the menu bar includes File, Edit, View, Navigate, Query, Tools, and Help. The Oracle logo is in the top right corner. Below the menu bar, there are navigation tabs for Service, Activities, Solutions, Accounts, and Contacts. The main area displays a list of Service Requests with columns for Rout SR Number, Account, First Name, Last Name, Symptom(s), Status, SR Modified Date, Open Date, and Defect #. A red circle highlights the 'Saved Queries' dropdown menu, which is set to 'Steve's Open SRs'. A red arrow points from this menu to a tooltip that appears over the list, containing the text: '*Steve's Pending and Monitor SRs', 'Steve's Open SRs', and 'Unassigned SR's'. Below the list, the detailed view for SR 2100315910 is shown, including Contact information, Description, and State details.

Rout SR Number	Account	First Name	Last Name	Symptom(s)	Status	SR Modified Date	Open Date	Defect #
2100315910	Ortronics	John	Turner	Customer has 3 'old' PADS files (2 .jobs, 1 .pcb) that won't open in his version of PADS. Wants to know if we can convert these so he can.	6-Pending I	2007-03-01 06:44:22	2006-09-06 18:14:12	0035841
2182016961	Tri Star	David	Drury	the problem is...	2-Pending	2008-09-09 17:30:44	2008-09-09 17:28:39	
226193401	Instrumentation Laboratory	David	Cox	Scaled attributes print full size in PDF	2-Pending	2008-05-12 17:17:49	2004-06-25 16:18:27	
227614605	Acme Packet, Inc.	Steve	Sharland	Using scout to generate my xref's. Problem is that I r	2-Pending	2008-06-02 14:26:35	2004-07-14 19:53:45	
228221901	SKY Skan	Francis	Vesey	Is there a way to add special characters to net labels	7-Pending I	2007-03-01 06:50:31	2004-07-22 15:07:21	00131
237544801	3 Ring Circuits	Mike	Bromberg	Customer loaded ePD 2004 (using his new license I gc	6-Pending I	2007-03-01 15:51:40	2004-11-11 20:22:24	00314
239599501	Invensys System Inc	Brett	Wheeler	DX PDF does not allow the use of Courier font when c	2-Pending	2008-05-12 18:09:51	2004-12-07 13:39:52	
245914101	Brookhaven National Laboratory	Anand	Kandasamy	FlexIm licensing	7-Pending I	2007-09-05 03:10:17	2005-02-22 18:25:23	00255
247800502	Analogic Corporation	Bill	Lawless	Does ePD (DxDesigner, DxDataBook, et all) support v	7-Pending I	2007-03-01 16:20:31	2005-03-11 17:15:44	00250

2100315910

Menu | New | Copy | Cancel | Query | Search | Assign | Unassign | SPOC | RouteToMGC | Service Request

Contact

Site ID: 116588 Account: Ortronics
Last Name: Turner First Name: John
Reply: Eng OK?: Y
Time Zone: (GMT-05:00) Eastern Tim Resp. Region: North America
Phone: +1 860-405-2926 x Email: jturner@ortronics.com
Support Info: Support=Openline Support By=Distributor Support Customer Class=Mass Market Account Region=North America

Description

Product: PADS Layout Area: Usage
Version: 2005 SPac2 Platform: Windows
Target: O/S Ver: XP
Serial #: Alt Info:
Symptoms: Customer has 3 'old' PADS files (2 .jobs, 1 .pcb) that won't open in his version of PADS. Wants to know if we can convert these so he can.

State

SR # 2100315910 DR # 00355841
Opened: 2006-09-06 18:14:12 Backline:
Contacted: 2006-09-06 18:14:12 Direct Access: Y
Closed: Closed In One:
Reason: Internal:
Status: 6-Pending Defect Priority: 3-Medium
Owner: STEVE_GUMTOW

Sorting in List Views - 1

The screenshot displays the Oracle Service Requests List interface. The top navigation bar includes 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The Oracle logo is in the top right corner. Below the navigation bar, there are tabs for 'Service', 'Activities', 'Solutions', 'Accounts', 'Contacts', and 'User Preferences'. The main content area shows a table of Service Requests. A context menu is open over the table, listing various actions such as 'Undo Record', 'Delete Record', 'New Record', 'Copy Record', 'Save Record', 'New Query', 'Run Query', 'Refine Query', 'About Record', 'Record Count', 'Create Bookmark...', 'Print Preview...', 'Print...', 'Columns Displayed', 'Advanced Sort', 'Import...', and 'Export...'. The 'Advanced Sort' option is highlighted with a red box.

SR Number	Symptom(s)	Email	First Name	Last Name	Defect #	Priority	Product
> 279449801	Testing spam	peter_mann@mentor.com	Peter	Mann	00150180	3-Medium	GTS Testing

Sorting Popup - 2

The screenshot shows a Microsoft Internet Explorer window titled "http://iweb.mentor.com - Sort Order - Microsoft Internet Explorer". The main content area contains a sorting configuration form with the following elements:

- Sort By:** A dropdown menu followed by radio buttons for "Ascending" (selected) and "Descending".
- Then By:** A dropdown menu followed by radio buttons for "Ascending" (selected) and "Descending".
- Then By:** A dropdown menu followed by radio buttons for "Ascending" (selected) and "Descending".

At the bottom right of the form are "OK" and "Cancel" buttons. The status bar at the bottom shows "Done" and "Internet".

Making a query your default - 1

The screenshot shows the Oracle Service Requests application interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below the menu bar, there are navigation tabs for 'Service Requests', 'Activities', and 'Solutions'. A dropdown menu is open under 'Tools', showing options like 'Auto Expense Report', 'Auto Timesheet', 'Communications', and 'User Preferences', with 'User Preferences' highlighted in a red box. Below the menu, there is a table of Service Requests with columns: Rout SR Number, Account, First Name, Last Name, Symptom(s), Status, SR Modified Date, Open Date, and Defect #. The table contains several rows of data, with the first row highlighted in yellow. Below the table, there is a detailed view for the selected request (2100315910). This view is divided into three main sections: Contact, Description, and State. The Contact section includes fields for Site ID, Account, Last Name, First Name, Reply, Time Zone, Phone, and Email. The Description section includes fields for Product, Area, Version, Platform, Target, O/S Ver, Serial #, and Symptoms. The State section includes fields for SR #, DR #, Opened, Contacted, Closed, Reason, Status, Priority, and Owner.

Rout SR Number	Account	First Name	Last Name	Symptom(s)	Status	SR Modified Date	Open Date	Defect #
2100315910	Ortronics	John	Turner	Customer has 3 'old' PADS files (2 .jobs, 1 .pcb) that won't open in his version of PADS. Wants to know if we can convert these so he can.	6-Pending I	2007-03-01 06:44:22	2006-09-06 18:14:12	0035841
2182016961	Tri Star	David	Drury	the problem is...	2-Pending	2008-09-09 17:30:44	2008-09-09 17:28:39	
226193401	Instrumentation Laboratory	David	Cox	Scaled attributes print full size in PDF	2-Pending	2008-05-12 17:17:49	2004-06-25 16:18:27	
227614605	Acme Packet, Inc.	Steve	Sharland	Using scout to generate my xrefs. Problem is that I r	2-Pending	2008-06-02 14:26:35	2004-07-14 19:53:45	
228221901	SKY Skan	Francis	Vesey	Is there a way to add special characters to net labels	7-Pending I	2007-03-01 06:50:31	2004-07-22 15:07:21	00131
237544801	3 Ring Circuits	Mike	Bromberg	Customer loaded ePD 2004 (using his new license I gc	6-Pending I	2007-03-01 15:51:40	2004-11-11 20:22:24	00314
239599501	Invensys System Inc	Brett	Wheeler	DX PDF does not allow the use of Courier font when c	2-Pending	2008-05-12 18:09:51	2004-12-07 13:39:52	
245914101	Brookhaven National Laboratory	Anand	Kandasamy	FlexIm licensing	7-Pending I	2007-09-05 03:10:17	2005-02-22 18:25:23	00255
247800502	Analogic Corporation	Bill	Lawless	Does ePD (DxDDesigner, DxDataBook, et all) support v	7-Pending I	2007-03-01 16:20:31	2005-03-11 17:15:44	00250

2100315910 | 1 of 9+ | [Refresh]

Menu | New | Copy | Cancel | Query | Search | Assign | Unassign | SPOC | RouteToMGC | Service Request

Contact

Site ID: 116588 | Account: Ortronics
Last Name: Turner | First Name: John
Reply: | Eng OK?: Y
Time Zone: (GMT-05:00) Eastern Tim | Resp. Region: North America
Phone: +1 860-405-2926 x | Email: jturner@ortronics.com
Support Info: Support=Openline | Support By=Distributor | Support Customer Class=Mass Market | Account Region=North America

Description

Product: PADS Layout | Area: Usage
Version: 2005 5Pac2 | Platform: Windows
Target: | O/S Ver: XP
Serial #: | Alt Info: |
Symptoms: Customer has 3 'old' PADS files (2 .jobs, 1 .pcb) that won't open in his version of PADS. Wants to know if we can convert these so he can.

State

SR #: 2100315910 | DR #: 0035841
Opened: 2006-09-06 18:14:12 | Backline:
Contacted: 2006-09-06 18:14:12 | Direct Access: Y
Closed: | Closed In One: |
Reason: | Internal:
Status: 6-Pending Defect | Priority: 3-Medium
Owner: STEVE_GUMTOW

Tools > User Preferences

Making a query your default - 2

The screenshot shows the Oracle CRM interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The Oracle logo is in the top right corner. Below the menu bar, there is a 'Saved Queries' field. The main area is divided into several tabs: 'Service', 'Activities', 'Solutions', 'Accounts', 'Contacts', and 'User Preferences'. The 'User Preferences' tab is selected, and within it, the 'Default Queries' sub-tab is highlighted with a red box. Below this, there are two sections: 'Screen' and 'Screen View'. The 'Screen' section has a table with columns 'Screen Name' and 'Default Query'. The 'Screen View' section has a table with columns 'View Name' and 'Default Query'. Both tables have a yellow highlight on the first row.

Screen Name	Default Query
> Accounts	
Activities	
Contacts	
Search	
Service Requests	
Solutions	
User Preferences	

View Name	Default Query
> Account Home	
Contacts	
More Info	

User Preferences tab > Default Queries View Link

Setting your Default Queries for each view - 3

The screenshot displays the Oracle iWeb Mentor user interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The 'ORACLE' logo is in the top right corner. Below the menu bar, there is a 'Saved Queries:' section with a dropdown menu and search icons. The main interface is divided into two sections: 'Default Queries' and 'Screen View'.

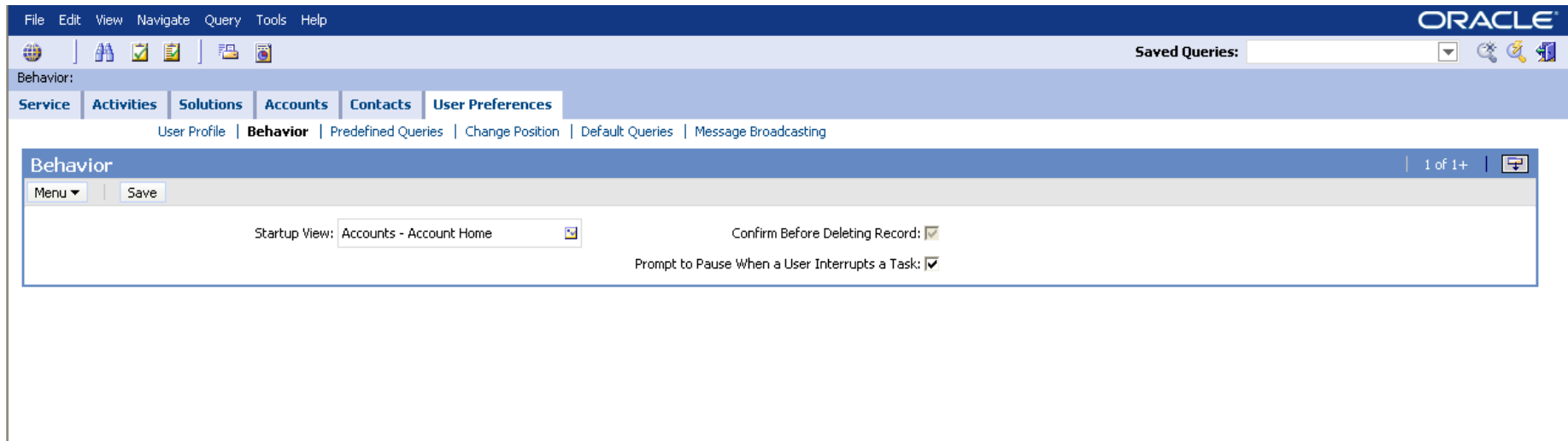
Default Queries: This section has tabs for 'Service', 'Activities', 'Solutions', 'Accounts', 'Contacts', and 'User Preferences'. Under 'User Preferences', there are sub-tabs for 'User Profile', 'Behavior', 'Predefined Queries', 'Change Position', 'Default Queries', and 'Message Broadcasting'. The 'Screen' dropdown is set to 'Menu' and 'Query'. A list of screen names is shown, with 'Service Requests' highlighted in yellow.

Screen View: This section has a 'View Name' and 'Default Query' column. The list includes:

View Name	Default Query
> SR Candidates	Unassigned SR's
SR Detail	*Steve's Pending and Monitor SRs
SR Home	
SR List	Unassigned SR's

A pop-up window titled 'http://iweb.mentor.com - Pick Query - Microsoft Internet Explorer' is overlaid on the 'Screen View' section. It shows a search bar with 'Query' and 'Find Query' buttons. The 'Starting with' dropdown is set to '<Case Required>'. The search results show a list of queries, with '*Steve's Pending and Monitor SRs' highlighted in yellow. Other queries listed are 'Steve's Open SRs' and 'Unassigned SR's'. The window has 'OK' and 'Cancel' buttons at the bottom right.

Setting your startup view screen



User Preferences > Behavior view link
Click on Startup View pick map
Select the view you want on start up

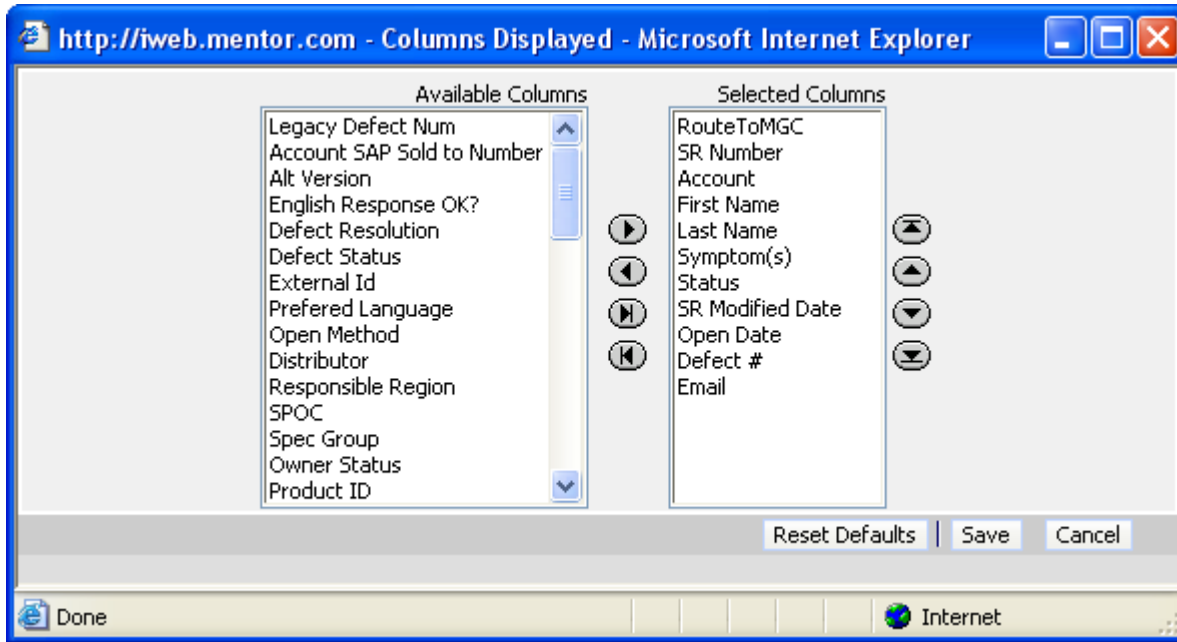
Re-ordering your columns - 1

The screenshot shows the Oracle Service Requests web interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below the menu bar, there are tabs for 'Service', 'Activities', 'Solutions', 'Accounts', 'Contacts', and 'User Preferences'. The main content area displays a table of Service Requests. A context menu is open over the table, listing various actions such as 'Undo Record', 'Delete Record', 'New Record', 'Copy Record', 'Save Record', 'New Query', 'Run Query', 'Refine Query', 'About Record', 'Record Count', 'Create Bookmark...', 'Print Preview...', 'Print', 'Columns Displayed', 'Advanced Sort', 'Import...', and 'Export...'. The 'Columns Displayed' option is highlighted with a red box. The table below the menu shows columns for Product ID, Node ID, Global Parent Nar, External System, Account, SR Modified Date, Symptom(s), Site ID, Global SR TS, Activity, and Activity Activ. The first row of data is highlighted in yellow.

Product ID	Node ID	Global Parent Nar	External System	Account	SR Modified Date	Symptom(s)	Site ID	Global SR TS	Activity	Activity Activ
P10697	C102-5157-G148-P1			GTS US Distributor Site for Testing	2007-03-01 14:48:0	Testing Open customer email notification	131671	2008-07-30 13:25:3	2008-07-2005	

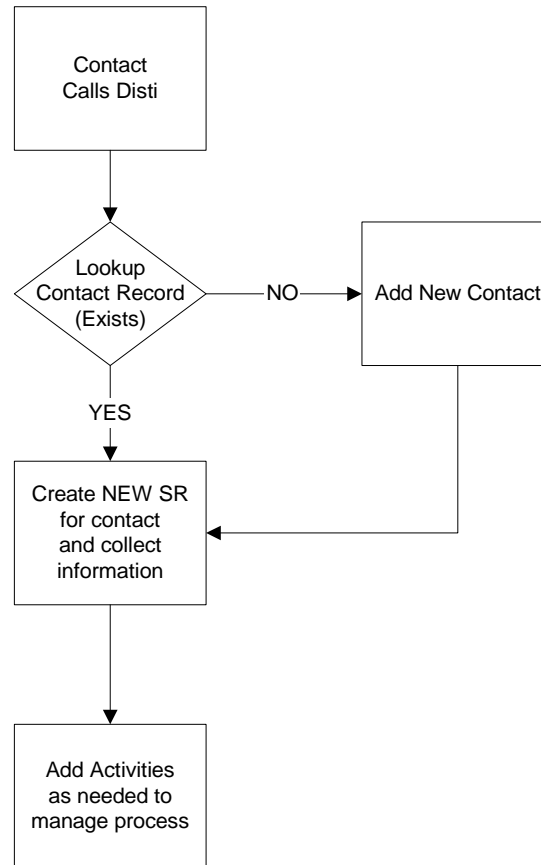
Right Mouse click in list applets > Select Columns Displayed

Re-ordering your columns - 2



- 1) Look for column name by using first letter of label (e.g., S for Symptoms)
- 2) Arrows in middle are used to move single or all records between “Available Columns” and “Selected Columns”
- 3) Arrows on right side are used to adjust a field up or down in order
- 4) Save the settings

Opening an SR Flow



Lookup Contact

File Edit View Navigate Query Tools Help

Contact:

Service Activities Solutions Accounts **Contacts** User Preferences

[Contacts Home](#) | [Contacts List](#)

Search

First:

Last:

Email:

Site:

Account:

Frequently Viewed Contacts

Recent Records

Contact Detail Applet - 1

The screenshot displays the Oracle Contact Detail Applet interface. At the top, there is a menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. The Oracle logo is in the top right corner. Below the menu bar, there are navigation tabs: Service, Activities, Solutions, Accounts, **Contacts**, and User Preferences. The 'Contacts' tab is active, and a sub-tab 'Contacts List' is selected. A table of contacts is shown below, with one contact selected. Below the table, there are tabs for 'More Info', 'Service Request', 'Activities', and 'History'. The 'More Info' tab is active, showing a detailed view of the selected contact. The detailed view is divided into three sections: Contact Information, Account/Organization, and Preferences.

Account	Cust Class	Site ID	Account SAP Sold	English Response	Support	Support Provider	Account is delete	Disallow Emails	Global Parent Nar	Standard Custom	Email
> GTS US Distributor	S Mass Market	131671	0000220744	Y	Openline	Distributor Support	N			MENTOR GRAPHICS	peter_mann@mentor.com

Contact Information

Last Name: * Mann First Name: * Peter
 Middle Name: M/M: Mr.
 Email Address: * peter_mann@mentor.com
 Ph +: * 1 Alt +: 1
 Ph #: * 2222222222 Alt #: Not Available
 Ph x: 7777 Alt X: Address: 8005 SW Boeckman RoadIn2Ln3
 City: Wilsonville State: OR
 Country: United States Zip: 97070-7777

Account/Organization

Account: * GTS US Distributor Si Site ID: 131671
 Name: 0000220744
 Local=N Support=Openline Support By=Distributor
 Support: Address: 8005 SW Boeckman Rd.
 City: WILSONVILLE State: OR
 Country: United States Zip: 97070

Preferences

Newsletter: SNet: Eng Response OK?: * Y
 Pref. Lang: * English SR Email Notification: DR_OPENED
 Reply: Responsible Region: * North America
 Platform: Newsletter Subsc: Active: Y
 Product: AccuSim SNet Login Name: PETER_MANN@MENTOR.C
 O/S Version: Job Title: Global Opt Out:
 Fax +: 1 Fax #: Not Available Fax X:

Contact Detail Applet - 2

The screenshot shows a web application window with a menu bar at the top containing 'More Info', 'Service Request', 'Activities', and 'History'. Below the menu bar is a toolbar with a 'Menu' dropdown and four buttons: 'New', 'Copy', 'Cancel', and 'Query'. The 'New' button is highlighted with a red box. Below the toolbar is a section titled 'Contact Information' containing several form fields:

Last Name: *	Mann	First Name: *	Peter
Middle Name:		M/M:	Mr.
Email Address: *	peter_mann@mentor.com		
Ph +: *	1	Alt +:	1
Ph #: *	2222222222	Alt #:	Not Available
Ph x:	7777	Alt X:	
Address:	8005 SW Boeckman RoadIn2In3		
City:	Wilsonville	State:	OR
Country:	United States	Zip:	97070-7777

* Indicates required fields

Contact Detail Applet - 3

The screenshot displays a web-based form titled "Account/Organization". It contains several input fields and sections, some of which are highlighted with a red border:

- Account/Organization** (Section Header)
- Account:** * GTS US Distributor Si (with a small icon) **Site ID:** 131671
- Name:** 0000220744
- Support:** Local=N Support=Openline Support By=Distributor Support (with a small icon and a scrollable area)
- Address:** 8005 SW Boeckman Rd. (with a small icon)
- City:** WILSONVILLE **State:** OR (with a dropdown arrow)
- Country:** United States (with a dropdown arrow) **Zip:** 97070

Account Name and Site ID from SAP

Distributor SAP Sold To #

Support Contract Status and comments

Account Address Information

* Indicates required fields

Contact Detail Applet - 4

1 of 1

Preferences

Newsletter: SNet: Eng Response OK?:* Y

Pref. Lang:* English SR Email Notification: DR_OPENED

Reply: Responsible Region:* North America

Platform: Newsletter Subsc:

Product: AccuSim Active: Y

O/S Version: SNet Login Name: PETER_MANN@MENTOR.C

Fax +: 1 Job Title:

Fax #: Not Available Global Opt Out:

Fax X:

SupportNet Fields

* Indicates required fields

Opening an SR

The screenshot displays the Oracle CRM interface. At the top, the menu bar includes File, Edit, View, Navigate, Query, Tools, and Help. The Oracle logo is in the top right corner. Below the menu bar, there are navigation tabs: Service, Activities, Solutions, Accounts, Contacts, and User Preferences. The main area shows a list of contacts with columns: Account, Cust Class, Site ID, Account SAP Sold, English Response, Support, Support Provider, Account is delete, Disallow Emails, Global Parent Nar, Standard Custom, and Email. A single contact is listed: GTS US Distributor S, Mass Market, Site ID 131671, Account SAP Sold 0000220744, English Response Y, Support Online, Support Provider Distributor Support, Account is delete N, Disallow Emails, Global Parent Nar, Standard Custom, and Email MENTOR GRAPHICS peter_mann@mentor.com. Below the list, a 'More Info' section is expanded, showing tabs for Service Request (highlighted with a red box), Activities, and History. The 'Service Request' tab is active, displaying a form with three main sections: Contact Information, Account/Organization, and Preferences. The Contact Information section includes fields for Last Name (Mann), First Name (Peter), Middle Name, M/M (Mr.), Email Address (peter_mann@mentor.com), Phone numbers (Ph +: 1, Ph #: 2222222222, Ph x: 7777), Address (8005 SW Boeckman Road ln2ln3), City (Wilsonville), State (OR), and Country (United States). The Account/Organization section includes Account (GTS US Distributor Si), Site ID (131671), Name (0000220744), and Support (Local=N, Support=Openline, Support By=Distributor Support). The Preferences section includes Newsletter (unchecked), SNet (checked), Eng Response OK? (Y), Pref. Lang (English), SR Email Notification (DR_OPENED), Reply, Platform, Product (AccuSim), O/S Version, Responsible Region (North America), Newsletter Subsc, Active (Y), SNet Login Name (PETER_MANN@MENTOR.C), Fax + (1), Job Title, Fax # (Not Available), and Global Opt Out (unchecked).

Open SR – Service Request Sub-tab

The screenshot displays the Oracle Service Request (SR) sub-tab interface. The top navigation bar includes 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The 'ORACLE' logo is in the top right corner. Below the navigation bar, there are tabs for 'Service', 'Activities', 'Solutions', 'Accounts', 'Contacts', and 'User Preferences'. The 'Contacts' tab is active, showing a 'Contact' form with the following sections:

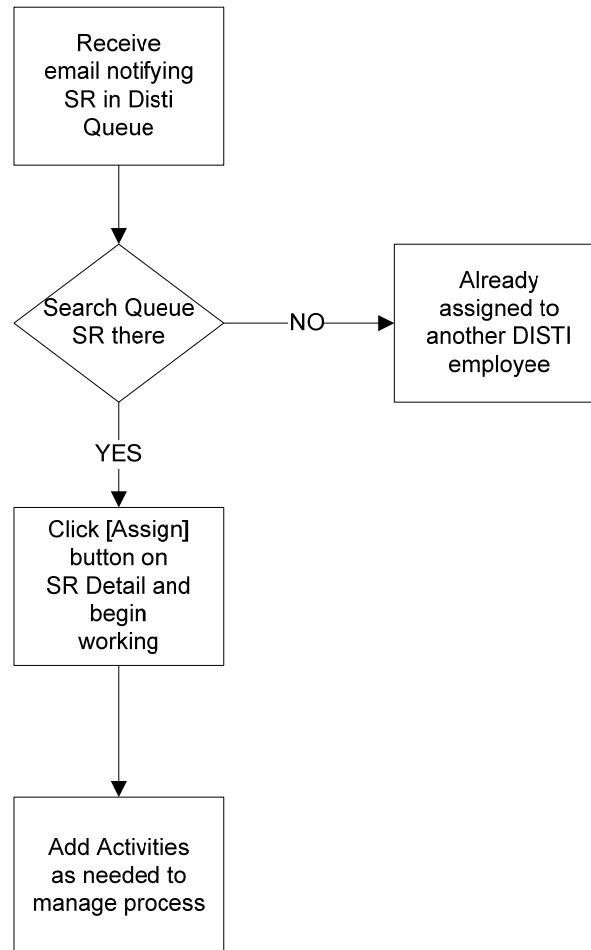
- Contact Information:** Last Name: Mann, First Name: Peter, Middle Name: (empty), M/M: Mr., Email Address: peter_mann@mentor.com, Ph #: 1, 2222222222, 7777, Address: 8005 SW Boeckman RoadIn2ln3, City: Wilsonville, State: OR, Country: United States, Zip: 97070-7777.
- Account/Organization:** Account: GTS US Distributor Si, Site ID: 131671, Name: 0000220744, Support: Local=N, Support=Openline, Support By=Distributor Support, Address: 8005 SW Boeckman Rd., City: WILSONVILLE, State: OR, Country: United States, Zip: 97070.
- Preferences:** Newsletter: (unchecked), SNet: (checked), Eng Response OK?: Y, Pref. Lang: English, SR Email Notification: DR_OPENED, Reply: (dropdown), Platform: (dropdown), Product: AccuSim, O/S Version: (dropdown), Responsible Region: North America, Newsletter Subsc: (empty), Active: Y, SNet Login Name: PETER_MANN@MENTOR.C, Job Title: (empty), Global Opt Out: (unchecked).

Below the contact form, there are tabs for 'More Info', 'Service Request', 'Activities', and 'History'. The 'Service Request' tab is active, showing a 'Service Request' form with the following sections:

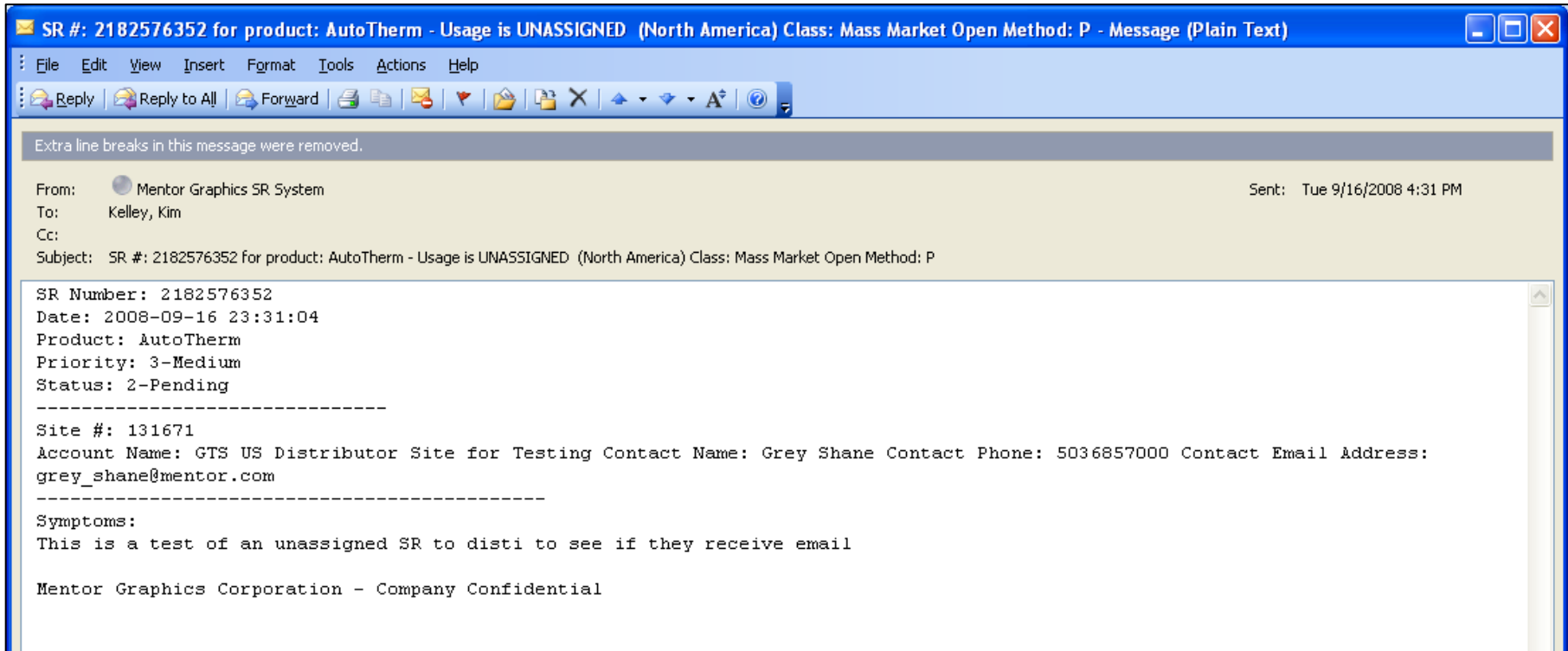
- Contact:** Site ID: 10672, Account: Mentor Graphics-Wilso, Last Name: Mann, First Name: Peter, Reply: (dropdown), Eng OK?: Y, Time Zone: (GMT-08:00) Pacific Time, Region: North America, Phone: +1 2222222222 x7777, Email: peter_mann@mentor.cor, Support Info: Support=Openline, Support By=MGC Support, Customer Class=Mass Market, Account Region=North America.
- Description:** Product: GTS Testing, Area: Usage, Version: (dropdown), Platform: N/A, Target: (dropdown), O/S Ver: N/A, Serial #: (empty), Alt Info: (empty), Symptoms: GTS Testing.
- State:** SR #: 631934, DR #: (empty), Opened: 2000-07-31 17:01:50, Contacted: 2000-07-31 17:01:50, Closed: 2006-10-20 13:28:37, Reason: Internal, Status: Closed, Priority: 3-Medium, Owner: PETER_MANN.

Red boxes highlight the 'Contact Information' section, the 'Product' dropdown in the 'Preferences' section, the 'New' button in the 'Service Request' tab, and the 'Symptoms' field in the 'Description' section. Red arrows point from the 'New' button to the 'Site ID' field in the 'Contact' section and from the 'Product' dropdown to the 'Product' field in the 'Description' section.

Working with the Queue



Email Notification



Viewing UNASSIGNED SR/RAs

File Edit View Navigate Query Tools Help

ORACLE

Service Requests: Saved Queries: Unassigned SRs

Service Activities Solutions Accounts Contacts User Preferences

SR Home SR List SR Detail SR Candidates SR History

Service Requests Menu New Cancel Query 1 - 2 of 2

Route	SR Number	Symptom(s)	Email	Last Name	First Name	Preferred Language	Open Method	Responsible Region	Account
>	2182547415	HAVING a problem with PADS Layout	peter_mann@mentor.com	Mann	Peter	English	P	North America	GTS US
	219786813	Testing Open customer email notification	kim_kelley@mentor.com	Kelley	Kim	English	D	North America	GTS US

2182547415 1 of 2

Menu New Copy Cancel Query Search Assign Unassign SPOC RouteToMGC Service Request

Contact

Site ID: 131671 Account: GTS US Distributor Site fc
Last Name: Mann First Name: Peter
Reply: Eng OK?: Y
Time Zone: (GMT-08:00) Pacific Time Resp. Region: North America
Phone: +1 2222222222 x7777 Email: peter_mann@mentor.com
Support Info: Support=Openline Support By=Distributor Support Customer Class=Mass Market Account Region=North America

Description

Product: PADS Layout Area: Usage
Version: 2004 SPac1 Platform: Windows
Target: O/S Ver: XP
Serial #: Alt Info:
Symptoms: HAVING a problem with PADS Layout

State

SR #: 2182547415 DR #:
Opened: 2008-09-16 13:01:12 Backline:
Contacted: Direct Access: N
Closed: Closed In One:
Reason: Internal:
Status: 2-Pending Priority: 3-Medium
Owner: UNASSIGNED-0000220744

Assigning SRs to yourself

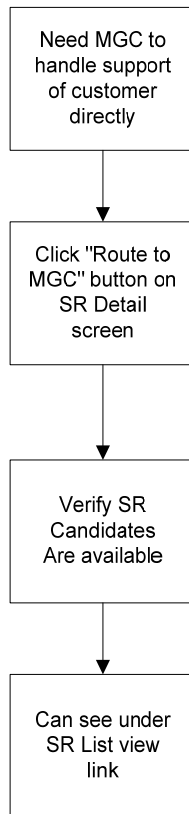
The screenshot shows the Oracle Service Requests (SR) interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The 'ORACLE' logo is in the top right corner. Below the menu bar, there is a 'Saved Queries' dropdown set to 'Unassigned SRs'. The main area is titled 'Service Requests:' and has tabs for 'Service', 'Activities', 'Solutions', 'Accounts', 'Contacts', and 'User Preferences'. Below these tabs are links for 'SR Home', 'SR List', 'SR Detail', 'SR Candidates', and 'SR History'. A 'Service Requests' section includes a 'Menu' dropdown, 'New', 'Cancel', and 'Query' buttons. A table lists two service requests:

Route	SR Number	Symptom(s)	Email	Last Name	First Name	Preferred Language	Open Method	Responsible Region	Account
>	2182547415	Having a problem with PADS Layout	peter_mann@mentor.com	Mann	Peter	English	P	North America	GTS U
	219786813	Testing Open customer email notification	kim_kelley@mentor.com	Kelley	Kim	English	D	North America	GTS U

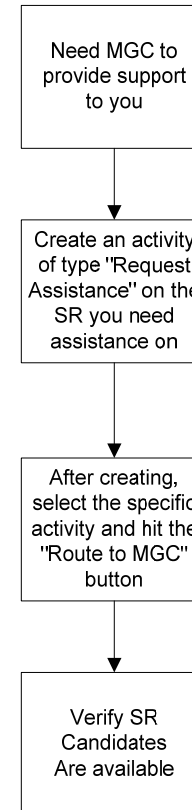
Below the table, the detailed view for SR 2182547415 is shown. The 'Assign' button in the top navigation bar is highlighted with a red box. The 'State' section on the right has the 'Owner' field set to 'DENNIS_QUAID', which is also highlighted with a red box. Other fields in the 'State' section include SR #, DR #, Opened, Contacted, Closed, Reason, Status (2-Pending), and Priority (3-Medium).

Escalating a SR or RA

Service Request



Request Assistance



Routing an SR to MGC

The screenshot displays the Oracle Service Request (SR) management interface. The top navigation bar includes 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The 'Service Requests' section is active, showing 'SR #:' 2182547415. The 'RouteToMGC' button is highlighted with a red box. Below the main interface, a 'Service Requests List' table is shown, with the 'RouteToMGC' column highlighted in yellow and a checkmark in the first row.

RouteToMGC	SR Number	Product	Symptom(s)	Open Method	Responsible Region	Email
✓	2182547415	PADS Layout	HAVING a problem with PADS Layout	P	North America	peter_mann@mentor

- Routing an SR means you want to MGC to contact the customer directly.

Routing an RA to MGC

Time Zone: (GMT-08:00) Pacific Time Resp. Region: North America Serial #: Alt Info: Closed: Closed In One: Reason: Internal: Status: * 2-Pending Priority: * 3-Medium Owner: * UNASSIGNED-0000220744

Phone: +1 5036857000 Email: grey_shane@mentor.com

Support Info: Support=Openline Support By=Distributor Support Customer Class=Mass Market Account Region=North America

Symptoms: * This is a test of an unassigned SR to disti to see if they receive email

Activities | Menu | New Delete Query Call Assign Unassign SPOC **RouteToMGC**

Open Date	Assigned To	Priority	Status	Product	Area	RouteToMGC
> 2008-09-16 22:57:54	UNASSIGNED-00002	Medium	Pending	HyperLynx	Licensing	✓
2008-09-16 22:49:02	DENNIS_QUAID	Medium	Done	HyperLynx	Usage	

Activity Comments (Limit 16,383 Char) 238

Having problems with the licensing manager for HyperLynx, please help here. Here are the steps I have followed for the installation:

- 1) Installed the software
- 2) Check the license daemon was installed
- 3) Walked over and got a dongle

Activity Attachments | Menu | New Delete Cancel Query New File New URL No Records

Attachment Nam	Size (In Bytes)	Type	Modified	Comments
----------------	-----------------	------	----------	----------

Solutions | Menu | Delete Cancel Query New/Link No Records

Title	Solution	Created
-------	----------	---------

- **Routing an RA (request assistance) activity means you want an MGC CAE to assist you. You maintain ownership of the SR.**

To See Candidates for SRs and RAs

SR Candidates View

Service Request: 2182576352 -- Grey Shane > Service Requests:

Service | Activities | Solutions | Accounts | Contacts | User Preferences

SR Home | SR List | SR Detail | **SR Candidates** | SR History

Service Requests | Menu | New | Cancel | Query

SR Number	Product	Area	Defect Resolution	Defect Status	Responsibility
> 2182576352	HyperLynx	Usage			North America

Menu | Query

Score	Candidate	Profile Name	Email	First Name	Created	Phone
> 100	DENNIS_QUAID	Default Partner Prof	kim_kelley@mentor.com	Dennis	2008-09-16 16:57:0	

Activity Candidates View

Activity: Activity Home | Activity List | **Activity Candidates** | Activity History

Activities | Menu | New | Delete | Query | Call | Assign | Unassign | SPOC | RouteToMGC

Activity #	Attachment Flag	Comments	Created	Created By Email	Created By
> 1-30P94I		Having problems with the licensing manager for HyperLynx, please help here. Here are the steps I have followed for the installation: 1) Installed the software 2) Check the license daemon was installed 3) Walked over and got a dongle	2008-09-16 22:57:54	kim_kelley@mentor.com	DENNIS_QUAID

Menu | Query

Score	Candidate	Profile Name	Email	First Name	Created	Phone
> 100	DOUG_NIWA	ENV Profile	doug_niwa@mentor.com	Doug	2008-09-16 23:00:0	(503) 253-4444
100	JOHN_WALLICK	new_profile	john_wallick@mentor.com	John	2008-09-16 23:00:0	(503) 253-4444
100	CLINTON_WITTSTRUCK	Clinton's Profile	clinton_wittstruck@mentor.com	Clinton	2008-09-16 23:00:0	(503) 253-4444
100	TERRY_BAXTER	terry_baxter	terry_baxter@mentor.com	Terry	2008-09-16 23:00:0	(503) 253-4444
100	ANDREW_AUDOVA	Main	andrew_audova@mentor.com	Andrew	2008-09-16 23:00:0	(503) 253-4444
100	RANGARAJ_5	All Prod	rangaraj_s@mentor.com	Rangaraj	2008-09-16 23:00:0	(503) 253-4444
100	ATSUSHI_NASU		atsushi_nasu@mentor.com	Atsushi	2008-09-16 23:00:0	+81 90 4333 3333
100	KEN_FOSTER	Ken Foster	ken_foster@mentor.com	Ken	2008-09-16 23:00:0	(503) 253-4444
100	ED_BARTLETT	My Routing Profile	ed_bartlett@mentor.com	Ed	2008-09-16 23:00:0	685 253-4444


Viewing Defect Information

File Edit View Navigate Query Tools Help ORACLE

SR #:279449801 > SR #:

Service Activities Solutions Accounts Contacts User Preferences

SR Home | SR List | **SR Detail** | SR Candidates | SR History

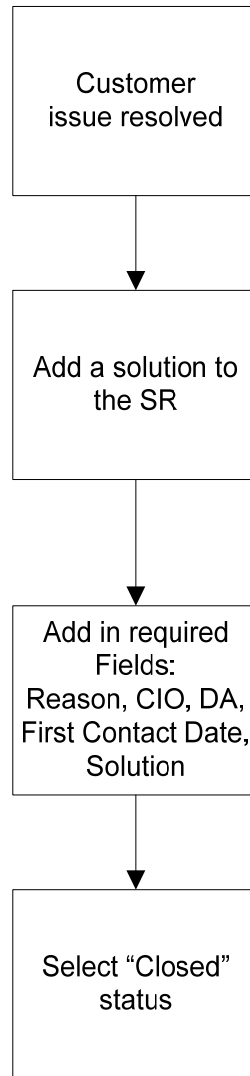
279449801 1 of 1+ 

Menu | New Copy Cancel Query Search Assign Unassign SPOC RouteToMGC | Service Request

Contact	Description	State
Site ID:* 131671 Account: GTS US Distributor Site fc Last Name:* Mann First Name:* Peter Reply: Eng OK?: Y Time Zone: (GMT-08:00) Pacific Time Resp. Region: North America Phone: +1 2222222222 x7777 Email: peter_mann@mentor.cor Support Info: Support=Openline Support By=Distributor Support Customer Class=Mass Market Account Region=North America	Product:* GTS Testing Area:* Usage Version:* Platform:* Windows Target: O/S Ver:* ME Serial #: Alt Info: Testing spam Symptoms:*	SR # 279449801 DR # 00150180 Opened:* 2006-02-14 11:37:03 Backline: <input type="checkbox"/> Contacted: Direct Access:* N Closed: Closed In One: Reason: Internal: <input type="checkbox"/> Status:* 6-Pending Defect Priority:* 3-Medium Owner:* PETER_MANN

Additional Contact Info	Additional Defect Info	Additional SR Info
Class: Mass Market Language: English SPOC: CHRISTINA_HELMES	Type: Defect Status: Postponed Release: Not Scheduled Resolution:	Spec Grp: SUPP ENG Open Method: P Ext. Id: Product ID: P10309

Closing an SR



Adding a Solution

The screenshot shows the Oracle Service Request (SR) management interface. A dialog box titled "MGC Add Solutions - Microsoft Internet Explorer" is open, displaying a table of solutions. The table has the following data:

Solution Id	Title	Solution	Created By	Created
1-ZQMAD	Try this one	Here is a solution...	DENNIS_QUAID	2005-07-19 07:01:37
1-7AXZ8	test solution	test	DENNIS_QUAID	2003-09-04 08:46:36
1-7AXQZ	This is a test solution here is the solution		DENNIS_QUAID	2003-09-04 08:55:02
1-7B4X2	test supportnet solu supportnet solution		DENNIS_QUAID	2003-09-04 11:11:15

The dialog box also includes tabs for "New Solution", "My Solutions", and "All Solutions", a search field for "Solution Id", and "OK" and "Cancel" buttons. A red arrow points from the "New/Link" button in the "Solutions" table below to the "Solution Id" column header in the dialog box table.

The "Solutions" table below the dialog box has the following data:

Title	Solution	Created

Closing an SR

The image shows a screenshot of a Service Request (SR) form. The main form is titled "2182576352" and includes sections for "Contact", "Description", and "State". A circular magnification highlights the "State" section, which is also shown in a larger, detailed view below. In this detailed view, several fields are highlighted with red boxes: "Contacted", "Closed", "Reason", "Status", and "Owner".

Contact

Site ID: 131671 Account: GTS US Distributor Site Fc
Last Name: Shane First Name: Grey
Reply: Eng OK?: Y
Time Zone: (GMT-08:00) Pacific Time Resp. Region: North America
Phone: +1 5036857000 Email: grey_shane@mentor.com
Support Info: Support=Openline Support By=Distributor Support Customer Class=Mass Market Account Region=North America

Description

Product: HyperLynx Area: Usage
Version: 6.0 Platform: Windows
Target: O/S Ver: 2003
Serial #: Alt Info:
Symptoms: This is a test of an unassigned SR to distl to see if they receive email

State

SR #: 2182576352 DR #:
Opened: 2008-09-16 16:30:06 Backline:
Contacted: Direct Access: N
Closed: Closed In One:
Reason: Internal:
Status: 2-Pending Priority: 3-Medium
Owner: UNASSIGNED-0000220744

State (Magnified View)

SR #: 2182576352 DR #:
Opened: 2008-09-16 16:30:06 Backline:
Contacted: Direct Access: N
Closed: Closed In One:
Reason: Internal:
Status: 2-Pending Priority: 3-Medium
Owner: UNASSIGNED-0000220744

Exporting Data from List Applets

The screenshot illustrates the process of exporting data from an Oracle web interface. The main window shows a list of records with columns: Account, SR Modified Date, and Site ID. A red box highlights the 'Export Data Map' option in the 'File' menu. An arrow points from this menu item to an 'Export' dialog box. The dialog box has three sections: 'Rows to Export' (with 'All Rows In Current Query' selected), 'Columns To Export' (with 'Visible Columns' selected), and 'Output Format' (with 'Tab Delimited Text File' selected). Another arrow points from the 'Export' dialog to a Microsoft Excel spreadsheet window titled 'output[1].csv'. The spreadsheet shows the following data:

RouteToM	SR Number	Symptom	Account	SR Modified	Site ID
Y	2.18E+09	This is a p	GTS US D	#####	131671
	2.2E+08	Testing Op	GTS US D	#####	131671

Siebel 8 Cheat Sheet

- Action Pane
- Application-Level Menu
- Application Toolbar
- Thread Bar
- Screen Tabs
- Link Bar
- Menu Button
- Applet Buttons (Part of Form Applet)

Control/Name
Site Map Button
Search Button
How Do I Button
Tasks Button
Print Button
Reports Button
New Query Button
Execute Query Button

Form Applet (Example of fields write protected)

Applet Buttons (Part of List Applet)

List Applet

Search Form Applet

View Tabs

Applet Buttons (Part of Form Applet)

Help = CTRL + H
or
Help > Contents

Refresh = ALT + ENTER

Search = CTRL + Shift + F

Form Applet (Example of fields not write protected)

* Red Stars, Indicate Required Fields

The screenshot shows the Siebel 8 interface in a browser window titled "GTS Test:87 - Microsoft Internet Explorer". The interface includes a top navigation bar with "Dashboard", "Service", and "Activities" tabs. Below this is a "Saved Queries" dropdown menu showing "Tis Is My Queue". A "Thread Bar" displays "1 of 2+" and navigation buttons. The main content area shows a "Contact" form with fields for Site ID, Last Name, Reply, Time Zone, and Phone. Below the contact form is an "Activities" list with columns for "Activity #" and "Internal Description". A "Text Editor" window is open over the activities list, showing "View or Edit text!".

Do not close the browser window to log out of Siebel 8 ... Use the Log Out button or CNTL + SHIFT + X

Queries Drop-Down List

Show More and Show Less Button

Record Navigation Button

Field

Calendar Button

Drop-Down List

Single Select Button

Text Editor Button

Vertical Scroll Bars

Multiple Selection Dialog box

The screenshot shows the "More Info" view of a contact record. It includes tabs for "More Info", "Service Request", "Activities", "History", and "Contact Product Preferences". The "Contact Information" section contains fields for Last Name, First Name, Middle Name, Email Address, and Phone. The "Account/Orga" section contains fields for Account, Name, Support, and Address. A "Multiple Selection Dialog box" is open, showing a list of addresses with columns for "Primary", "Address Line 1", "Address Line 2", "City", and "Zip Code".

Dialog Box

Multiple Select Button

The screenshot shows the "Multiple Selection Dialog box" with a table of addresses. The table has columns for "Primary", "Address Line 1", "Address Line 2", "City", and "Zip Code". The first row is highlighted in yellow.

Primary	Address Line 1	Address Line 2	City	Zip Code
<input type="checkbox"/>	8005 SW Boeckman Building D		Wilsonville	97070-7777
<input checked="" type="checkbox"/>	8005 SW Boeckman Building C		Wilsonville	97070-7777

The screenshot shows the "Multiple Selection Dialog box" with a form for address details. The form includes fields for Address Name, Address Line 1, Address Line 2, City, State, Zip Code, Country, Primary, and Name Lock.

Address Name:	8005 SW Boeckman
Address Line 1:	8005 SW Boeckman
Address Line 2:	Building E
City:	Wilsonville
State:	OR
Zip Code:	97070-7777
Country:	United States
Primary:	<input type="checkbox"/>
Name Lock:	<input type="checkbox"/>

Questions?

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