

My Siebel iHelp!

What is iHelp? A training tool embedded within Siebel that can be launched from a toolbar icon or any screen to provide step by step instructions.

The screenshot displays the Siebel user interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons, including a circled 'iHelp' icon. The main content area is divided into several sections: 'Customer Name', 'Account', 'Site', 'Work Phone #', 'Email Address', and 'Job Title'. There are also 'Go To' and 'Update' buttons. A 'How do I...' window is open on the left side, titled 'Create A Contact'. It contains a list of steps: 1. Click on New on either the top or bottom half of the screen. 2. Fill in the Last Name and First Name fields. 3. Click on the hyperlinked Last Name to go to the Contact details view. 4. Add basic contact details in the top part of the screen, including address and information on how to reach this client. 5. Fill out extended client information on the lower half of the screen. 6. Press ctrl+s or step off the record to save. The main content area also features 'Frequently Viewed Contacts' and 'Recent Records' sections. A blue arrow points to the 'iHelp' button in the top right corner of the main content area.

Using iHelp

There are two ways to access iHelp. 1) Through the clickable button circled above on the tool bar (located directly above the Contacts tab) or 2) through clickable links titled “iHelp” on any screen. iHelp tasks are related to the screen you are currently viewing. For example, this is a view of the Contacts homepage. As you can see, the two iHelp links that are currently available are related to Contacts only.

When you select an iHelp, a “How do I...” window will appear on the left hand side of your screen. This window will walk you through the steps required to complete the specific task on that screen: in the case above “How do I create a contact?”

Benefits of using iHelp -

- Increases productivity by providing immediate access to step by step guidance.
- Reduces follow-up training needs.
- Helps to identify workflow process.

iHelp is available throughout the system and was created and designed with workers in mind. For Initial Win, iHelp will assist you with navigating the system. In the future, iHelp may assist you in many other ways!