



# **Siebel Employee Relationship Management Administration Guide**

Version 7.7, Rev. B  
November 2009

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# 1

## What's New in This Release

### What's New in Siebel Employee Relationship Management Administration Guide, Version 7.7, Rev. B

This guide has been updated to reflect product name changes.

### What's New in Siebel Employee Relationship Management Administration Guide, Version 7.7, Rev. A

[Table 1](#) lists changes in this version of the documentation to support release 7.7 of the software.

Table 1. Changes in Siebel Employee Relationship Management Administration Guide, Version 7.7, Rev. A

Topic	Description
<i>New features described</i>	
Ratings Distribution Adjustments See <a href="#">Chapter 7, "Working with Ratings Distributions."</a>	This chapter describes how administrators can set up and managers can use Ratings Distributions to meet the ratings distribution guideline defined by the organization.
<i>Improvements to the documentation</i>	
Compensation Planning See <a href="#">"Navigating the Compensation Planning Screen (Managers)" on page 86.</a>	This topic has been expanded to include information about ratings distributions and compensation components.
Compensation Planning See <a href="#">"Defining Compensation Changes for Direct Reports" on page 89.</a>	This topic has been updated to include information on the compensation guidelines indicator.
Compensation Planning Recommendations Status See <a href="#">"Tracking Compensation Plan Recommendations Status" on page 91.</a>	This topic has been updated and corrected.

## What's New in Siebel Employee Relationship Management Administration Guide, Version 7.7

Table 2 lists changes in this version of the documentation to support release 7.7 of the software.

Table 2. New Product Features in Siebel Employee Relationship Management Administration Guide, Version 7.7

Topic	Description
Objectives and Reviews Attributes See <a href="#">"Managing Objectives and Reviews by Organization"</a> on page 55.	This new feature allows the administrator to manage attributes at the organization level to control which objectives and reviews appear on the Performance Management Dashboard, All Employee Objectives, and My Team's Objectives views.
Objectives Definitions See <a href="#">"Defining Objectives Before the Next Period Begins"</a> on page 56.	This new feature allows the administrator to create objective records in the database before the next performance cycle begins.
Objectives and Reviews Status Updates See <a href="#">"Managing and Updating Objectives and Reviews"</a> on page 57.	This new feature allows the administrator to update the status and details (including ratings and comments) of an employee's objectives and reviews.
Objectives Updates See <a href="#">"Unlocking Approved Objectives for Midperiod Updates"</a> on page 59.	This new features allows the administrator to unlock objectives so that employees can update their objectives in the middle of a period.
Performance Review Delegation See <a href="#">"Delegating a Performance Review"</a> on page 63.	This new feature allows managers to delegate a performance review and then check the status of each delegated review from the Performance Management Dashboard.
Performance Assessments See <a href="#">"Adding Performance Assessments During the Cycle (End User)"</a> on page 65.	This new feature allows managers and employees to add midcycle performance assessment comments for objectives.
Objectives Progress See <a href="#">"Tracking Progress on Objectives (End User)"</a> on page 65.	This new feature allows employees and managers to update the progress on each objective at any time during the objectives and reviews cycle.

Table 2. New Product Features in Siebel Employee Relationship Management Administration Guide, Version 7.7

Topic	Description
Compensation Support Team See <a href="#">"Assigning Compensation Support Team Members to Employees"</a> on page 92.	This new feature allows Human Resources to assign support team members to assist managers who cannot perform compensation plan actions and employees who request compensation advice.
Group News Versions See <a href="#">"Managing Versions and Publishing from the All News Stories List"</a> on page 122.	This new feature allows users to manage the versions of a news story, review the version history, preview and restore previous versions of a story, and perform one-click publication of a news story from the All News list.



# 2

## Overview of Siebel ERM

Oracle's Siebel Employee Relationship Management (ERM) is an integrated suite of Web-based applications designed for use by employees within an organization.

This chapter provides an overview of the applications that make up Siebel ERM. It includes the following topics:

- [Key Features of Siebel ERM on page 15](#)
- [Siebel ERM Front Page, MyPage on page 19](#)
- [Siebel ERM Front Page, MyPage on page 19](#)
- [ERM Briefing Pages on page 23](#)
- [ERM Microsite Pages on page 23](#)

## Key Features of Siebel ERM

Siebel Employee Relationship Management (ERM) provides a single point of access to a variety of information resources within an organization.

Siebel ERM helps the organizations communicate news, deliver training, and support employee productivity and satisfaction. In addition, Siebel ERM helps employees align their objectives with those of the organization and provides access to application data, news, business information, productivity tools, employee self-service solutions, and other resources in a personalized Web environment.

[Table 3](#) provides an alphabetized list of Siebel ERM's key features.

Table 3. Key Features of Siebel ERM

Feature	Description
Compensation Planning	Siebel Compensation Planning help the organization organizations plan merit-based and promotion-based salary increases, cash bonuses, and stock grants. For more information, see <a href="#">Chapter 6, "Setting Up Compensation Planning."</a>
Competency Management	Siebel Competency Management allows employees and managers to associate specific skills with job and employee profiles. For more information, see <a href="#">Chapter 8, "Setting Up Competency Management."</a>
Employee Directory	Siebel Employee Directory allows users and administrators to manage and view employee profile information. For more information, see <a href="#">Chapter 4, "Setting Up Employee Directory."</a>

Table 3. Key Features of Siebel ERM

Feature	Description
Employee Self-Service	Using Siebel Employee Self-Service (ESS), employees can manage routine and frequent transactions using the Web. ESS automated processes guide users through necessary steps, incorporate relevant data, accept user input, and automatically route approvals. For more information, see <a href="#">Chapter 12, "Setting Up Employee Self-Service."</a>
Group News	Siebel Group News helps the organization create, edit, approve, preview, and publish news content. For more information, see <a href="#">Chapter 9, "Managing Group News."</a>
HelpDesk	Siebel HelpDesk allows employees to submit and track service requests using the organization intranet and solve problems by providing access to solutions and interactive diagnostic tools. For more information, see <a href="#">Chapter 11, "Setting Up HelpDesk."</a>
Inbox	The Inbox allows managers and employees to view and act on approval requests from a single unified screen. Inbox also allows administrators to create and manage approval flows. For more information about setting up Inbox, see <i>Applications Administration Guide</i> .
Objectives and Reviews	Siebel Objectives and Reviews is used to set employee objectives and assess performance using periodic and annual reviews. For more information, see <a href="#">Chapter 5, "Setting Up Objectives and Reviews."</a>
Projects	Siebel Projects provides a shared company workspace that allows employees within an organization, regardless of physical location, to organize, coordinate and manage their formal and ad-hoc project assignments. For more information, see <a href="#">Chapter 13, "Setting Up Siebel Projects for ERM."</a>
Ratings Distributions	Using Siebel Ratings Distributions, managers can make sure that they meet the ratings distribution guideline defined by their organization and provide a set of ratings that are consistent across different business units. For more information, see <a href="#">Chapter 7, "Working with Ratings Distributions."</a>

## ERM Modules and Options

Many Siebel eBusiness Applications modules can be purchased and used with Siebel ERM. In addition, optional modules specific to Siebel ERM can be purchased to provide enhanced functionality for various business processes.

For information on the optional modules that can be used with Siebel ERM, contact your Siebel sales representative or local Siebel Sales Office.

The exact configuration of Siebel applications screens, views, and fields depends on your company's configuration of the application.

For introductory information on using the Siebel applications standard interface, see *Fundamentals*.



Table 4 describes some of the ERM-specific optional modules.

Table 4. ERM Optional Modules

Optional module	Description
Events Management	The Siebel Events Management module lets you plan, execute, and evaluate marketing events and set up an Events Management Web site where users can learn about and register for events. For more information, see <i>Siebel Events Management Guide</i> .
eAdvisor	The eAdvisor application is intended for users who need advice and guidance to configure products, create quotes, or purchase products from Siebel Customer and Partner Application Web sites. For more information, see <i>Siebel Interactive Designer Administration Guide</i> .
Training	Siebel Training provides a Learning Management System for organizations that host and manage end-user training. The Siebel Training application includes a course registration system, course catalog, curriculum planning, and skills testing, as well as a training resources library. A variety of delivery methods are supported, including Web-based, instructor-led, prerecorded and virtual classroom training. For more information about setting up and managing training, see <i>Siebel Training Guide</i> .
Workforce Analytics	Workforce Analytics allows users to analyze, query, send alerts, and report on data using the HelpDesk, Performance Management, and Training modules. For more information on Workforce Analytics, see <i>Siebel Analytics User Guide</i> .

## Content and Information Management and Siebel ERM

Siebel ERM corporate content applications help organizations create and manage content, while providing employees with the tools to access product, customer, and industry information from a single, central location. Siebel ERM corporate content aggregates business data from multiple sources, such as your Siebel database, the Internet, legacy systems, and third-party news services.

As an administrator, you can configure your Siebel application to show this data in one of the following types of Web pages:

- **Home page.** This page provides employees with information such as new opportunities, service requests, company news, and literature from the Siebel Encyclopedia.

**NOTE:** Siebel Encyclopedia is a feature that aggregates the files and attachments used in your Siebel application, such as literature, images, and products. To access the Siebel Encyclopedia, users can use one of the predefined views, such as Literature, Catalog, or Pricing in the application.

From the Home page, users can search the Web using Internet search engines, track expense reports, and view personalized news topics. Users can customize and personalize the content that appears on the home page.

- **Briefing pages.** These pages provide employees with a briefing-style summary of important business information about accounts, competitors, and other organizations, and can include recent news, relevant data from the Siebel database, and company profiles provided by Siebel Content Services. For more information, see [“ERM Briefing Pages” on page 23](#) and *Siebel Briefings Administration Guide*.
- **Microsite pages.** These pages provide employees with information, such as corporate announcements, links to literature files, links to HTML files, and other key resources. Microsite pages are flexible, giving administrators the ability to integrate unstructured content on the same page with Siebel data. Siebel ERM ships with several preconfigured Microsite pages, such as the Human Resources page. For more information about microsites, see *Applications Administration Guide*.

### Siebel Content Services

Siebel Content Services is a news subscription service that is integrated with Siebel ERM. Customers who subscribe to Siebel Content Services receive premium news and company information from multiple sources that are preconfigured for Siebel ERM. Administrators can configure Siebel Content Services so that relevant content is delivered to the appropriate individuals. By associating specific types of content with specific groups of users, content can be targeted.

Siebel Content Services includes leading news wires, business magazines, newspapers, and trade journals. It provides news, company profiles, corporate relationship information, market data, and other relevant content that appear in context with your organization's data. For more information, see [Chapter 10, “Setting Up Content Services,”](#) and *Applications Administration Guide*.

## Siebel ERM Front Page, MyPage

When users log in to their Siebel ERM application, the first screen that appears is the ERM Front (home) Page or the user's myPage, depending on the user's preference.

The Front Page is personalized for each user. This page might include corporate announcements, the day's top headlines, feature articles, and targeted corporate information, for example, Spotlight on Sales.

The user's myPage might include service requests, an employee locator, recent news about selected accounts and competitors, feature articles about the organization, a contacts list, daily calendar, tasks, analytics reports, and other information links such as weather, Web search, and maps. The myPage layout can be edited to show the features that are most important to the user.

Figure 1 shows an example of a user's myPage. Personalized alerts appear under the greeting, followed by a list of My Customer's Service Requests. On the right are the Employee Locator and the user's calendar. At the top of the page are quick links to Site Map, Performance Management, Help Desk, Profile, and so on. By clicking Edit Layout the user can specify whether other sections such as tasks, reports, and news, appear on the page.

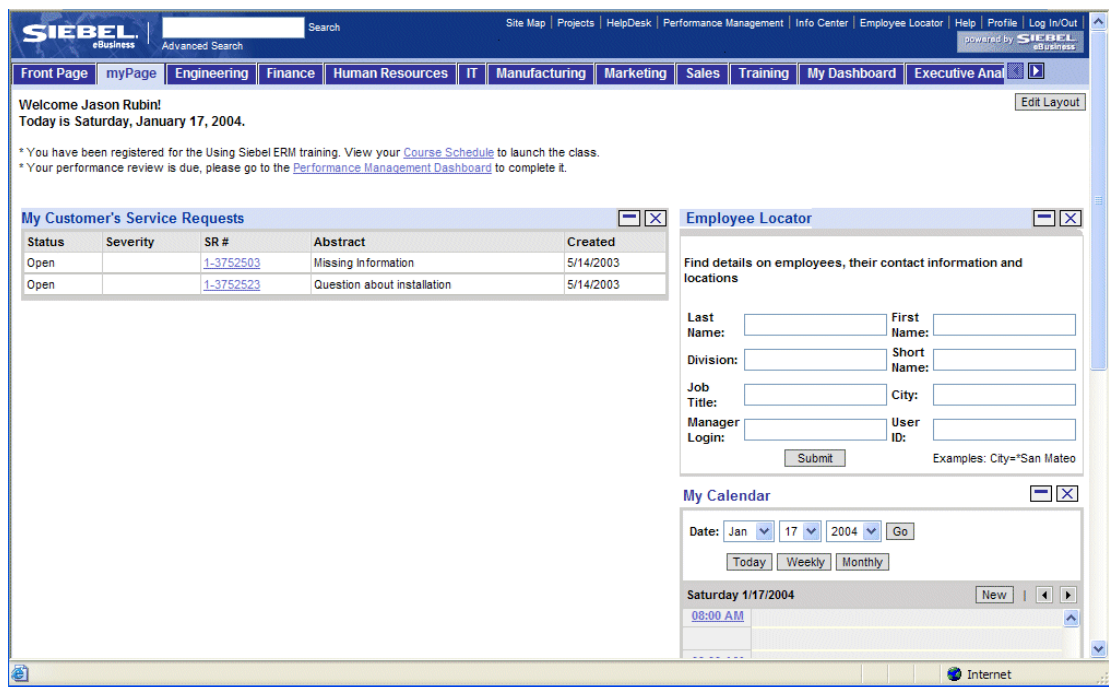


Figure 1. ERM myPage

Siebel ERM filters the data and content a user can view based on the visibility rules defined in the Siebel application and the user preferences set by the user in a tracking profile. Only data targeted for the user appears on the employee's home page.

For more information about visibility rules, see *Security Guide for Siebel eBusiness Applications*. For more information on tracking profiles, see [“Controlling ERM Page Topics with a Tracking Profile” on page 24](#).

## Front Page, MyPage Sections

Some of the internal sections of the home page are described in [Table 5](#). The search and sort specifications for internal sections are defined in the predefined query called Home. For more information about predefined queries, see *Applications Administration Guide*.

Table 5. ERM Home Page Siebel Data Sections

Section	Description	Controlled by Tracking Profile
Account/ Competitor News	Displays recent news articles related to an individual user's tracked accounts and competitors. This content only appears if the organization subscribes to Siebel Content Services.	Yes
Analytics Report	Displays personalized or organization-specific reports from Siebel Analytics.	Yes
Corporate Announcements	Displays links to Web pages, Web pages (appears in-line), or HTML. These records are entered in the Content Layout view with the following attributes: <ul style="list-style-type: none"> <li>■ View = Portal Page Home View</li> <li>■ Page = Home</li> <li>■ Section = Body</li> </ul> For more information on microsite management, see <i>Applications Administration Guide</i> .	No
Feature Articles	Displays new stories, Web pages, or HTML. These records are entered in the Content Layout view with the following attributes: <ul style="list-style-type: none"> <li>■ View = Portal Page Home View</li> <li>■ Page = Home</li> <li>■ Section = Body</li> </ul> For more information, see <a href="#">“ERM Microsite Pages” on page 23</a> and <i>Applications Administration Guide</i> .	No
Literature	Displays links to literature items in the Siebel Encyclopedia. Literature topics are defined in the user's tracking profile. The current date must be between the release and expiration dates.	Yes

Table 5. ERM Home Page Siebel Data Sections

Section	Description	Controlled by Tracking Profile
Map Search	Allows users to retrieve maps, directions, and travel distance information.	No
My Calendar	Allows users to view and maintain their Siebel calendars from the home page. The calendar can appear in a daily, weekly, or monthly format. Click the Time field to enter new activities.	No
My Customer's Service Requests	Displays open service requests created within the data duration date that is associated with the accounts to which the user is assigned.	No
My Events	Allows users to view a list of events for which they can register. This section also shows events to which users have an open invitation.	No
My News	Displays a list of news headlines. The user specifies the categories, topics, and related search items. The administrator can specify the number of previous days to search for news stories (history) and the maximum number of stories to be returned. Content is provided by Siebel Content Services.	No
My Opportunities	Displays the user's opportunities that have not been closed. Opportunities are sorted by the newest records, and then by revenue in descending order.	No
My Stocks	Allows users to select the stocks they want to appear. This page can be configured with the user's tracking profile. Allows administrators to embed market information in a section on the home page. The section is populated using the information provided by a third-party vendor of the customer's choice.	Yes
New Accounts	Displays accounts to which the user is assigned and that are marked as new. Accounts are sorted by name.	No
New Bulletins	Used to alert users of important company announcements. Displays broadcast messages defined in the Administration view. Messages that are created between the activation and expiration dates and designated for Siebel Briefings appear as bulletins in this section. Messages are sorted by creation date and then by abstract.	No
New Contacts	Displays contacts for whom the user is listed as a secondary user. Contacts are sorted by last name and then by first name.	No

Table 5. ERM Home Page Siebel Data Sections

Section	Description	Controlled by Tracking Profile
Customer Service Requests	Displays open service requests associated with the accounts to which the user is assigned and that were created within the data duration date. Service requests are sorted by status and then by severity.	No
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link and the Web display method is Not In-Line.	Yes
Today's Headlines	Displays today's headlines.	No
Top Story	Displays the top story.	No
Weather	Displays a current weather summary for the ZIP code selected on the user's tracking profile.	Yes
Web Clips	Displays the target Web page of a recommended link in-line with other sections. Web clips are recommended links stored in the Siebel Encyclopedia with a Web display method defined as In-Line.	Yes
Web Search	Allows users to search the Internet using industry recognized search engines.	No
Yellow Pages Search	Allows users to locate businesses by address and telephone number.	No

## Home Page Sections Containing External Data

Table 6 describes the ERM home page sections that include information from Siebel Content Services.

Table 6. ERM Home Page External Data Sections

Section	Description	Controlled by Tracking Profile
Company Search	Allows users to search the Siebel Company database to locate a company and obtain a Company Briefing that includes information such as Company Profiles and current news.	No
Our Company in the News	Displays recent news articles from Siebel Content Services news providers about the user's company.	No
Web Search	Allows users to search the Web using a leading Internet search engine.	No

## ERM Briefing Pages

Siebel ERM includes several briefing pages that provide users with critical business information about accounts, competitors, and other companies.

These briefing pages include:

- **Account briefings.** Account Briefings help users prepare for customer calls by keeping them informed about aspects of their accounts.
- **Competitor briefings.** The Competitor Briefing helps employees stay informed by gathering information about competitors.
- **Company briefings.** Siebel Content Services publishes a database of thousands of public and private companies. Users can get Company Briefings for any of these companies using the Company Search form on the home page.

For more information, see *Siebel Briefings Administration Guide*.

## ERM Microsite Pages

Siebel ERM includes several templates that help you structure and present information to users. For example, you might dedicate some of these views to publishing department-specific information, such as human resources and sales information. You might dedicate other pages to publishing information about cross-functional topics, such as products and partners.

For more information about setting up microsite pages, see *Applications Administration Guide*.

Figure 2 shows a sample microsite page for Marketing that includes several sections on the page. On the left in the navigation bar are links to other microsities such as Advertising and Public Relations. The middle section includes New and Highlights. On the right of the page is the Quick Picks section, which provides a list of links to other relevant pages and information.

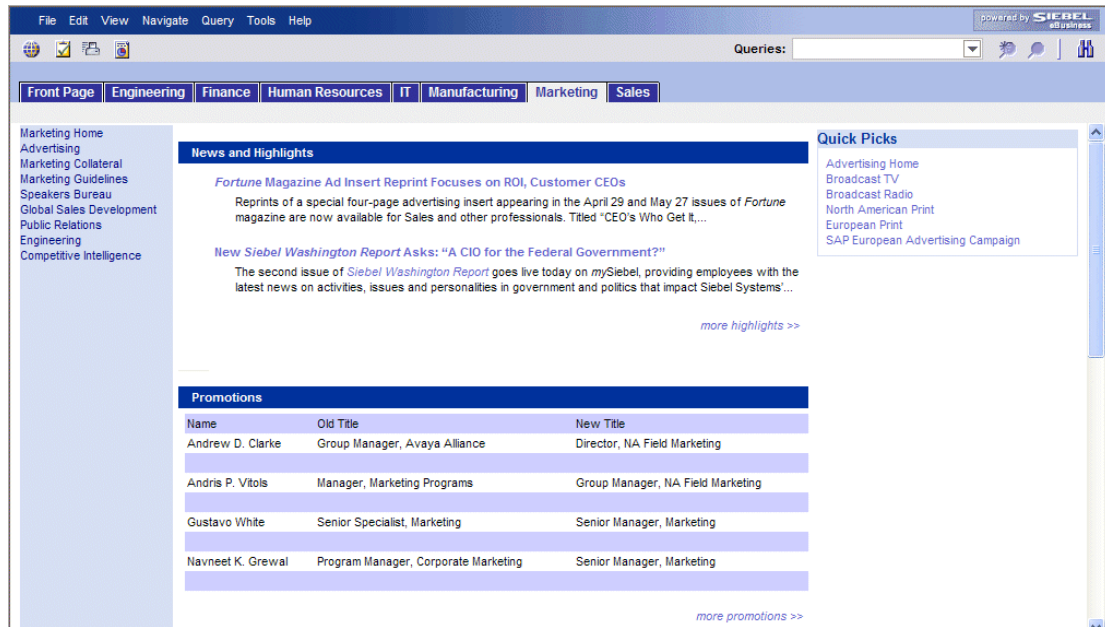


Figure 2. Sample Microsite Page

## Related Topics

[Controlling ERM Page Topics with a Tracking Profile on page 24](#)

[Layout Preferences for ERM Front Page and MyPage on page 26](#)

## Controlling ERM Page Topics with a Tracking Profile

The tracking profile allows users to control much of the information that appears on the ERM home page. By customizing the tracking profile, end users choose the topics that they want to track. For example, users can select the accounts that they want to receive news about. Only the information related to the selected topics appears on the ERM home page. This allows users to filter out information that is not relevant to their interests and responsibilities.

When users first use Siebel ERM, their tracking profiles do not include the accounts, competitors, industries, or products that the users want to track. Users must set preferences to receive, view, or access the following services:

- External and internal news and information about tracked accounts and competitors
- Literature associated with their preferred accounts, products, competitors, and industries
- Market information about selected stocks in the My Stocks section



- Account or competitor briefings from the Tracked Account or Tracked Competitor views

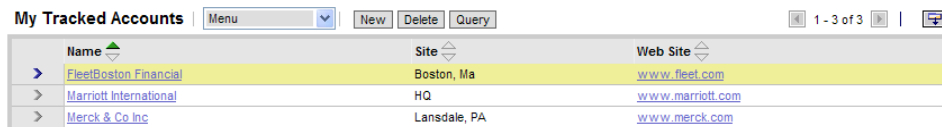
The tracking profile allows users to select:

- Accounts
- Competitors
- Industries
- Products
- Stocks
- News Topics
- Weather

Figure 3 shows the Tracked Accounts list of records. The columns in the list are Account Name, Site, and Web Site.

Users can access their tracking profiles by navigating to the Profile screen, and from the Summary screen, selecting a link from the left navigation bar.

For more information about tracking profiles, see *Siebel Briefings Administration Guide*.



Name	Site	Web Site
> FleetBoston Financial	Boston, Ma	www.fleet.com
> Marriott International	HQ	www.marriott.com
> Merck & Co Inc	Lansdale, PA	www.merck.com

Figure 3. Tracked Accounts

Literature from the Siebel Encyclopedia, news, recommended links, and related Web clips appear in the user's ERM home page after the user has subscribed to specific accounts.

The tracking profile controls the following sections of the ERM home page:

- Account, Competitor and industry News
- Products
- Literature
- Recommended Links
- Web Clips
- My News
- My Stocks
- Weather

### Related Topics

[ERM Microsite Pages on page 23](#)

[Layout Preferences for ERM Front Page and MyPage on page 26](#)

## Layout Preferences for ERM Front Page and MyPage

Users can control the layout of the home page and briefing-style pages (Account / Competitor Briefing and Company Briefing).

The Content Selection and Layout view, shown in [Figure 4](#), shows the order of lists and forms, and whether the lists and forms are visible or hidden. This view also allows users to expose lists or forms, reposition them, and to return the page layout to the default setting. The Content Selection and Layout view appears when you click the Edit Layout button located at the top of the ERM Front Page, and myPage.

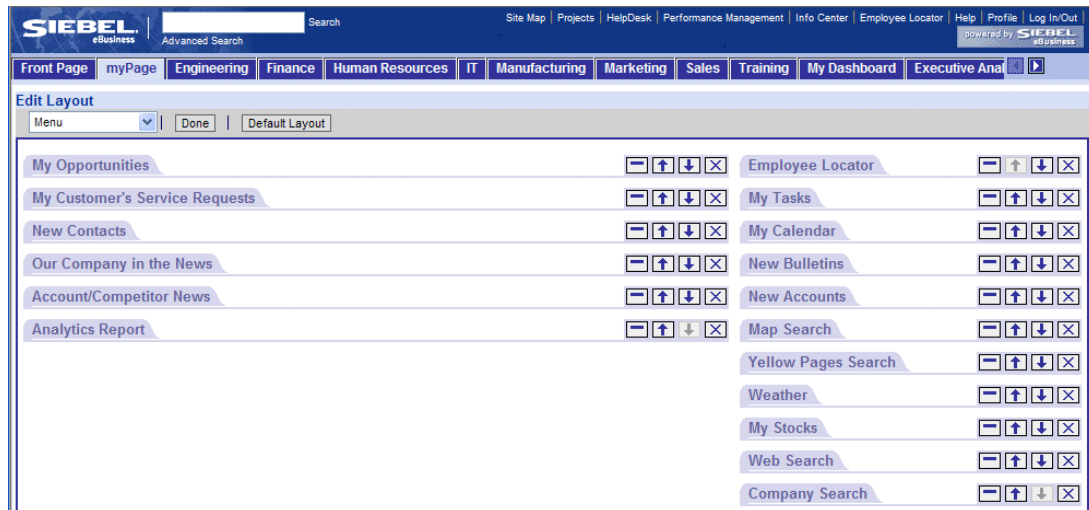


Figure 4. Content Selection and Layout View

Layout preferences are stored as part of the user profile and are independent of the client machine being used. For information about providing layout controls for end users, see *Configuring Siebel eBusiness Applications*, *Siebel Tools Online Help*, and *Using Siebel Tools*.

## Bulletins and ERM Home Page

Bulletins are internal company broadcast messages that alert users to important internal events and announcements from your company. Bulletins appear in the News Bulletins section of users' ERM home page. Users see bulletins that are associated with their user name or division, or that are broadcast to the entire organization. Typically, bulletins are generated by a system administrator or designated employees who have privileges to publish bulletins.

For more information about creating bulletins, see *Applications Administration Guide*.

## My Calendar

The My Calendar form appears on the home page and provides users with a calendar in daily, weekly, or monthly format. Users can view and maintain appointments, as well as view and maintain the calendars of team members who have granted access to their calendar.

## Web Search

The Web Search form allows users to search the Internet. Users enter the search terms in the Web Search form on the home page, and the results appear in a new browser window.

## Company Search

Users can search the Siebel eContent Services database for information on specific companies using the Company Search form.

## ERM Recommended Links

Recommended links are hyperlinks that appear in ERM pages. Administrators define and publish recommended links using the Literature Administration views in the Siebel application. Recommended links are stored in the Siebel Encyclopedia.

When you publish recommended links, you target a specific audience by associating recommended links with accounts, competitors, industries, and products. The recommended link is distributed to users who have subscribed to these topics in their tracking profile. You control the release and expiration date using the Portal Administration > Literature view.

For information on publishing recommended links, see *Applications Administration Guide*.

## ERM Web Clips

Web clips are static Web pages that appear in ERM. Marketing administrators define and publish Web clips using the Marketing Administration views in the Siebel application. Web clips are stored in the Siebel Encyclopedia as a specialized type of recommended link. For more information, see *Applications Administration Guide*.

## Related Topics

[ERM Microsite Pages on page 23](#)

[Controlling ERM Page Topics with a Tracking Profile on page 24](#)



# 3

## Getting Started with Siebel ERM

This chapter describes the applications administration procedures that are specific to Siebel ERM. Use this chapter in combination with *Applications Administration Guide*.

*Applications Administration Guide* covers the setup tasks that are common to all Siebel eBusiness Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information that you need to perform data administration and document administration tasks.

This guide assumes that you have already installed or completed the upgrade of Siebel ERM. If you have not, go to the Server Installation and Upgrade section of the Siebel Bookshelf and click the links to the guides that are relevant to your company's implementation.

The *Siebel Server Administration Guide* describes how to create the Siebel Administrator account that is used to perform the tasks described in this guide.

This chapter includes the following topic:

- [Administrator Setup Tasks on page 29](#)

### Administrator Setup Tasks

[Table 7](#) lists and describes the administrative setup tasks that are specific to Siebel ERM. The table also directs you to documentation that provides information about each task.

When setting up your application, use [Table 7](#) in combination with *Applications Administration Guide*.

Table 7. Administrative Setup Tasks

Administrative Task	Description	For More Information
Install servers and applications, and then enter license keys for specific Siebel applications.	Install Siebel Gateway Name Server, Siebel Server, Siebel Database Server, and Siebel Web Servers. Specify Content Services	Refer to the <i>Siebel Installation Guide</i> for the operating system you are using.  <a href="#">"Setting Up Content Services Host and Authentication Credentials" on page 132</a>
Set up the Application Services Interface (ASI) to synchronize data between ERM and a third-party system. (Optional)	Configure Web Services, activate the Employee ASI Workflow, and set up synchronization between ERM and the third-party system.	<a href="#">Chapter 14, "Setting Up an Application Services Interface."</a>

Table 7. Administrative Setup Tasks

Administrative Task	Description	For More Information
Activate ERM Business Processes	Verify that ERM-specific workflow processes are active, and create new processes if desired.	<i>Siebel Business Process Designer Administration Guide</i>  “Setting Up the Group News Approver Workflow” on page 118
Set up Responsibilities for delegated administrators and users.	Assign users and views to preconfigured responsibilities; create new responsibilities.	<i>Applications Administration Guide</i>  “Setting Up the Employee Administrator” on page 36  “Setting Up News Administrators, Authors, and Approvers” on page 117  “Assignment of News Topic Administrator Responsibilities” on page 131  “Setting Up Siebel HelpDesk Responsibilities” on page 154
Configure ERM for the GUESTERM user.	This user ID verifies that each user logging in to Siebel ERM sees the proper Home Page with the correct page tab.	“Configuring Siebel ERM for GUESTERM User” on page 30

## Configuring Siebel ERM for GUESTERM User

After installing the server and application, you must configure the application for the GUESTERM (guest ERM) user. This user ID verifies that each user logging in to Siebel ERM sees the proper Home Page with the correct page tab.

***To set up the GUESTERM user***

- 1 Using the appropriate database software for your database, create a database login with the following parameters.

Login = GUESTERM

Password = DBPASSWORD

(DBPASSWORD represents a password that you provide)

This step creates the GUESTERM user database account, as required for your RDBMS system.

**NOTE:** The password is only required for db2 and non DOCI MSSQL databases.

- 2 Stop the Web server.
- 3 Open the eapps. cfg file from SWEApp\BIN directory.

**NOTE:** The eapps. cfg file is installed on the Web server, within the Siebel directory.

The SWEApp\bin\eapps. cfg file includes definitions that allow unregistered user access.

- 4 Locate the following ERM section of the eapps. cfg file.

[/ERM]

AnonUserName = guesterm

AnonPassword = password

ConnectionString = ...

StartCommand = SWECmd=GotoView&SWEView=Portal+Page+Home+View

- 5 Enter the following values.

AnonUserName = GUESTERM

AnonPassword = DBPASSWORD

- 6 Save the eapps. cfg file.

Restart the Web server.





# 4

## Setting Up Employee Directory

Siebel Employee Directory is a Siebel ERM module that allows users and administrators to manage and view employee information. This chapter describes Employee Directory features and explains how to set up and manage employee profiles. It includes the following topics:

- [Employee Profile Management and Employee Directory on page 33](#)
- [Scenario for Employee Directory on page 35](#)
- [Process of Setting Up Employee Directory on page 36](#)
- [Setting Up the Employee Administrator on page 36](#)
- [Setting Up and Modifying Employee Information on page 36](#)
- [Adding an Employee Picture to a Profile on page 37](#)
- [Employee Locator on page 38](#)
- [Linking ESS Forms, Literature, and Solutions to Employee Directory on page 38](#)

## Employee Profile Management and Employee Directory

Siebel Employee Directory uses an employee profile repository to store information about each employee in an organization. The views associated with an employee record allow you to add the following types of information to build a profile of the employee that contains both personal and professional data.

### Employee Credentials

The following Employee views allow you to add and manage the certifications, honors, and awards the employee has achieved, as well as note the employee's professional memberships.

- **Certification.** Use this view to enter details about certifications an employee has received, the institution attended, and date of certification.
- **Honor/Award.** Use this view to enter details about honors and awards an employee has received, the institution that presented the honor or award, date received, and additional comments.
- **Membership.** Use this view to enter information about professional memberships the employee holds, active status, starting and ending dates, and whether the membership is company related.

## Resume Information

The following views allow you to view and manage the resume of each employee in an organization. You can restrict visibility of resumes to select groups of employees.

- **Education.** Use this view to enter details about an employee's education, including type of education, years of study, degree received, graduation date, and the institution where the employee studied.
- **Past Work Experience.** Use this view to record the employee's previous job experience, such as title, company name, industry, business unit, and starting and ending dates.

## Employee Competency Information

The following views allow you to manage and view an employee's skills. Managers can use this view to track skills gaps and build teams based on project skill needs.

- **Assignment Skills.** Use this view to enter the skills required to complete an assignment and any additional comments.
- **Competency.** Use this view to enter information on competencies the employee has achieved or needs to achieve, including the required level of competency, skill gap, parent skill, and root category for the skill. You can also enter the date the competency requirement was fulfilled, description, and critical degree of the competency. For more information, see [Chapter 8, "Setting Up Competency Management."](#)

## Employee Skill Utilization

The following views allow you to manage employee assignments and use an employee's skills:

- **Employee Assignment Rules.** Use this view to record assignment rules and filters that apply to an employee, along with the activation date, expiration date, and a description of the rule.
- **Employee Availability.** Use this view to enter an employee's availability for assignment and the project and account the employee is assigned to with starting and ending dates and estimated hours required.
- **Employee Exception Hours.** Use this view to enter any exception hours an employee works, the dates worked, type of exception, and reason for exception.
- **Employee Utilization.** Use the two drop-down lists in this view to display Utilization or Time Sheet Details and to select the type of chart display for this information—two-dimensional or three-dimensional line, bar, or stacked bar charts.

## Other Job-Related Information

The following views allow you to manage employment information and job tools and assets issued to the employee:

- **Employee Tools.** Use this view to enter information about the tools issued to the employee, such as the serial numbers, asset numbers, and quantity.
- **Job Information.** Use this view to view and enter information about the employee's employment status, compensation eligibility, and performance statistics.

- **Sensitive Job Information.** This read-only form provides compensation details for the employee, including salary, salary plan, bonus target percent, and so on.
- **Service Details.** This view includes information on the employee's service requirements, such as the cost per hour, shift schedule, and whether the employee is compensated for overtime hours.
- **Calendar.** This view shows the employee's calendar.
- **Calendar Administration.** This view is used to grant access to the employee's calendar to other employees. For more information about calendar views, see *Applications Administration Guide* and *Fundamentals*.
- **Employee Locator.** This view is typically used by end users to find employees based on the employee's profile data. For more information about using the Employee Locator, see *Fundamentals*.

The information stored in the employee profile repository is used by other Siebel applications and modules. For example, the skills in an employee's profile are used by Competency Management to calculate skills gaps, which helps to identify areas in which an employee needs to update his or her skills. The Employee details also are used by Employee Locator when you use this tool to search for an employee.

You can restrict visibility of an employee profile view based on the responsibilities of the employee. For more information about visibility and responsibilities, see *Applications Administration Guide*.

## Scenario for Employee Directory

This scenario provides an example of a process performed by a Siebel administrator and an HR employee administrator. Your company may follow a different process according to its business requirements.

### Administrator

An administrator at a software company needs to create a responsibility that allows a designated employee in the Human Resources department to manage employees.

First, the administrator creates the new responsibility, Employee Administrator, which allows access to the Administration - Employee screen. Then, the administrator assigns the appropriate employee to the new responsibility.

### Employee Administrator

The software company hires a number of programmers. The HR employee administrator is asked to set up the profiles for each employee and include a picture of the employee with each profile. The administrator already has a digital picture of each employee stored on the network for use as security badge photos. Using Siebel Employee Directory, the employee administrator creates a profile for each employee, adds the security badge picture to the profile, and makes sure the profiles and pictures are visible to employees.

## Process of Setting Up Employee Directory

The following lists show the procedures that application and employee administrators typically perform to set up Employee Directory. Your company may follow a different process according to its business requirements.

### Administrator Procedure

To set up Employee Directory, perform the following procedures:

- [Setting Up the Employee Administrator on page 36](#)

### Employee Administrator Procedures

To manage employee information, perform the following procedures:

- 1 [Setting Up and Modifying Employee Information on page 36.](#)
- 2 [Adding an Employee Picture to a Profile on page 37.](#)

## Setting Up the Employee Administrator

Before an HR employee administrator can work with employee profiles in the Siebel ERM application, the employee must be associated with the appropriate responsibilities. You can assign employees additional responsibilities that allow them to administer employee profiles. To set up an employee administrator, first create a responsibility that provides access to the Administration - Employee screen and then associate the responsibility with the appropriate employee. For more information on creating employee responsibilities, see *Security Guide for Siebel eBusiness Applications*.

This task is a step in [Process of Setting Up Employee Directory on page 36](#).

## Setting Up and Modifying Employee Information

Employee administrators manage employee profiles by adding employees, and then associating positions, responsibilities, organizations, territories, skills, credentials, and a resume with each employee.

These tasks are a step in ["Process of Setting Up Employee Directory" on page 36](#).

### *To set up an employee profile*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees.
- 2 In the Employees list, create a new employee record, complete the fields, and save the record.

- 3 In the new record, click the link in the Last Name field.
- 4 From the employee form, click the appropriate view tab, and enter information about the employee.

### ***To modify an employee profile***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees.
- 2 In the Employees list, query to find the employee profile.
- 3 In the record, click the link in the Last Name field.
- 4 From the employee form, click the appropriate view tab, and modify the information.

For more information on setting up an employee see *Security Guide for Siebel eBusiness Applications* and *Applications Administration Guide*.

## Adding an Employee Picture to a Profile

You can use Employee Directory to store images of each employee. After an image is associated with an employee record, other users see the image when they use the Employee Locator feature to find an employee. You can use the following supported image formats for an employee image:

- BMP
- JPG
- GIF

**NOTE:** The size of images is determined by the administrator.

These tasks are a step in [“Process of Setting Up Employee Directory” on page 36](#).

### ***To add an employee picture as a literature file***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Portal > Literature.
- 2 In the Literature form, create a new record, complete the fields, and then save the record.
  - a In the Type field, select Sales Tool.
  - b In the File Name field, browse to locate the employee picture, and then click Add.

### ***To associate the image with an employee record***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees.
- 2 In the Employees list, query for the employee record, and then click the link in the Last Name field.

- 3 From the Employee form, click the More Info view tab, and then scroll to the Miscellaneous section.
- 4 In the Image File Name field, click the select button, query for the image file, and then click OK.
- 5 Select the Include Image check box, and save the record.
- 6 Restart the ERM application.

## Employee Locator

The Employee Locator search feature can help users locate other employees based on the employee's profile data. The user can base an employee search on the following types of employee profile information:

- Employee details
- Skills
- Previous employment

For more information about using Employee Locator, see *Fundamentals*.

## Linking ESS Forms, Literature, and Solutions to Employee Directory

End users can request changes to personal information within the Employee Directory using the Request Changes button on the Employee Profile Locator Profile applet, the Employee Profile Locator My Profile applet, and the ERM Employee Locator Job Info applet. Clicking Request changes takes users to the InfoCenter, which displays ESS Forms, Literature, and Solutions.

Administrators can associate Employee Self-Service forms, literature, and solutions to the Request Changes buttons by using Catalog Administration. The catalog used in this case is ERM Employee Center.

This task is a step in ["Process of Setting Up Employee Directory" on page 36](#).

### ***To link ESS Forms to Request Changes buttons***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Catalog.
- 2 In the Catalog Administration list, query for ERM Employee Center.
- 3 In the ERM Employee Center record, click the link in the Name field.

- 4 From the Category detail form, navigate to the desired category.

The table that follows describes the applet-category mapping.

Applet	Target Category
Employee Profile Locator Profile	Employee Profile
Employee Profile Locator My Profile	My Profile
ERM Employee Locator Job Info	My Report Job Information

- 5 From the Category Detail form, click the link Troubleshooting/Access Instructions.  
If the link is not visible, click the drop-down list at the end of the link bar.
- 6 From the Troubleshooting/Access Instructions list, click New and add the ESS Form from the Pick SmartScript dialog box.

#### ***To add literature items***

- 1 From the Category Detail form, click the Literature link.
- 2 In the Literature list, click Add to add literature items.

#### ***To add solutions***

- 1 From the Category Detail form, click the Solutions link.
- 2 In the Solutions list, click New to add the desired solution.
- 3 Verify that the correct ESS forms (or solutions or literature) are visible by navigating to the end-user views.

**NOTE:** In Employee Locator, the employee's profile is only visible if the employee selects his own profile in Employee Directory. Similarly, Job Info is only available if the employee selects a direct report in Employee Directory.





# 5

## Setting Up Objectives and Reviews

Using Siebel Objectives and Reviews, completion of performance objectives and reviews becomes a collaborative process between management and employees. The organization provides feedback on employees' goals and objectives using periodic and annual reviews, 360-degree evaluations, and skills assessments.

This chapter covers administrator setup and end-user procedures for Objectives and Reviews. It includes the following topics:

- [Scenario for Objectives and Reviews on page 42](#)
- [Process of Setting Up Objectives and Reviews on page 44](#)
- [All-Employee Objective Hierarchy on page 46](#)
- [Publication of Objectives on Microsites on page 46](#)
- [Defining a Rating Scale with Rating Values on page 46](#)
- [Defining Review Periods and Rollups on page 48](#)
- [Defining Review Components on page 49](#)
- [Creating Objectives Templates on page 51](#)
- [Defining 360-Degree Evaluation Forms on page 52](#)
- [Creating Review Definitions on page 53](#)
- [Managing Objectives and Reviews by Organization on page 55](#)
- [Defining Objectives Before the Next Period Begins on page 56](#)
- [Managing and Updating Objectives and Reviews on page 57](#)
- [Unlocking Approved Objectives for Midperiod Updates on page 59](#)
- [Performance Management for Direct Reports on page 60](#)
- [Delegating a Performance Review on page 63](#)
- [Approving and Declining Submitted Performance Reviews on page 63](#)
- [Copying Previous Objectives \(End User\) on page 64](#)
- [Adding Performance Assessments During the Cycle \(End User\) on page 65](#)
- [Tracking Progress on Objectives \(End User\) on page 65](#)

## Scenario for Objectives and Reviews

This scenario provides an example of a process performed by an administrator, a manager, and an employee using Objectives and Reviews. Your company may follow a different process flow according to its business requirements.

### Administrator Sets Up Objectives and Reviews

Before an employee or manager can use the Objectives and Reviews system, the administrator sets up the system accordingly to the organization's performance management policies and procedures. For example, an organization may choose different components to make up a review. The administrator defines those components to match the organization's performance management goals.

The administrator defines review periods, review components, organizational hierarchy, rating scales, and so on.

### End Users Develop Objectives and Submit for Approval

At the beginning of each review period, an organization's employees use Siebel Objectives and Reviews to view corporate objectives and the objectives of their managers.

Using these cascading objectives as a guide, the employee develops individual objectives, and assigns each objective a weighting that is used to calculate the employee's overall performance rating at the end of the period. The employee may copy continuing objectives from the previous review periods forward into the new period.

After defining the objectives, the employee submits the objectives to the employee's manager for approval. The manager approves the objectives and the objectives are posted in a reporting-structure hierarchy, accessible for review by each employee in the organization.

During the performance period, the employee notes progress toward an objective, and adds comments. As an objective is achieved, the employee sets the status indicator to reflect progress.

At the end of each period, the employee begins the review process by completing a self-assessment that details achievement on each objective as well as documenting additional skills that have been acquired.

The employee submits the periodic assessment to a manager, who then rates and comments on the achievement of objectives and skills. An overall rating is calculated from individual numerical ratings and weightings assigned to each objective.

The employee's manager submits the review for approval by the next-level manager, and when the final approval is achieved, the review is returned to the employee for acknowledgement.

Figure 5 illustrates the process of setting and submitting objectives.

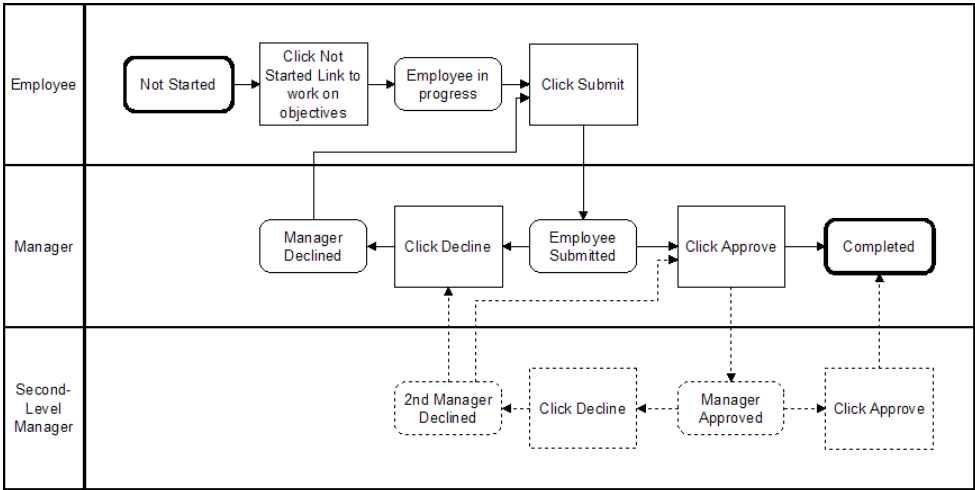


Figure 5. Objectives Cycle Process Flow

Managers Assess Progress and Conduct Reviews

After objectives are approved, the manager periodically comments on her direct reports' objectives, and sets progress status.

During the review cycle, the manager approves and declines some of the reviews and delegates other reviews of direct reports to another manager. The other manager then reviews the periodic assessment comments in the employee's objectives and conducts the review.

This review cycle process flow is illustrated in [Figure 6](#).

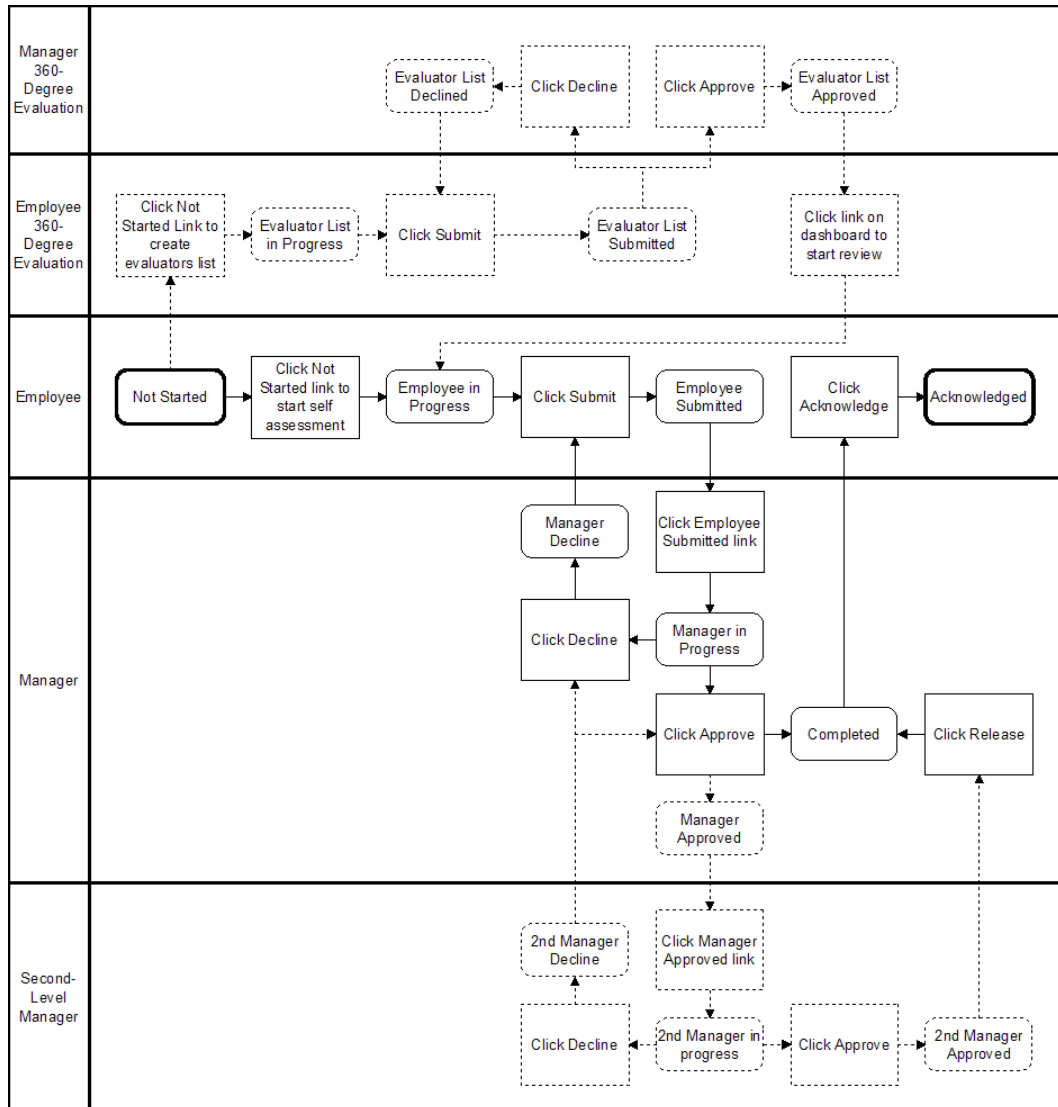


Figure 6. Review Cycle Process Flow

## Process of Setting Up Objectives and Reviews

The following lists show the procedures that an administrator might follow to set up objectives and reviews and users might perform to work with objectives and reviews. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up objectives and reviews:

Review the following topics:

- [All-Employee Objective Hierarchy on page 46](#)
- [Publication of Objectives on Microsites on page 46](#)

Perform the procedures in the following list:

- [Defining a Rating Scale with Rating Values on page 46](#)
- [Defining Review Periods and Rollups on page 48](#)
- [Defining Review Components on page 49](#)
- [Creating Objectives Templates on page 51](#)
- [Defining 360-Degree Evaluation Forms on page 52](#)
- [Creating Review Definitions on page 53](#)
- [Managing Objectives and Reviews by Organization on page 55](#)
- [Defining Objectives Before the Next Period Begins on page 56](#)
- [Managing and Updating Objectives and Reviews on page 57](#)
- [Unlocking Approved Objectives for Midperiod Updates on page 59](#)

## Manager Procedures

To manage objectives and reviews:

Review the following topics:

- [Performance Management for Direct Reports on page 60](#)
- [Navigating the Manager's Performance Dashboard on page 61](#)

Perform the procedures in the following list:

- [Delegating a Performance Review on page 63](#)
- [Approving and Declining Submitted Performance Reviews on page 63](#)

## End-User Procedures

To use objectives and reviews, perform the following procedures:

- 1 [Copying Previous Objectives \(End User\) on page 64](#)
- 2 [Adding Performance Assessments During the Cycle \(End User\) on page 65](#)
- 3 [Tracking Progress on Objectives \(End User\) on page 65](#)

## All-Employee Objective Hierarchy

The employee hierarchy is defined using Siebel Position Administration. The relationship between an employee's position and the corresponding parent position controls the approval routing for objectives and reviews, as well as the hierarchy within the All Employees Objectives and My Team's Objectives views. Employees whose positions do not have parent positions appear at the top level of the All Employees Objectives view and automatically bypass the manager approval process for both objectives and reviews.

To use Siebel Performance Management, users must have an active employee record and an active position. When an employee holds multiple positions, only the employee's primary position is used in the All Employees Objectives and My Team's Objectives views and when routing approvals.

**NOTE:** Each employee must have a different primary position. In other words, no other employee can have the same primary position. When more than one employee occupies the same position, the employee whose name comes first alphabetically appears in the All Employee Objectives and My Team's Objectives views. For more information on position administration, see *Applications Administration Guide*.

### Related Topic

[Process of Setting Up Objectives and Reviews on page 44](#)

## Publication of Objectives on Microsites

Publishing corporate objectives to the ERM Corporate Objectives view is administered using Siebel Microsite pages. For more information, see ["ERM Microsite Pages" on page 23](#) and *Applications Administration Guide*.

### Related Topic

[Process of Setting Up Objectives and Reviews on page 44](#)

## Defining a Rating Scale with Rating Values

When completing periodic and annual reviews, managers rate employees on individual objectives, shared objectives, and skills. To support this process, one or more rating scales are designed and administered within the application.

You can create multiple rating scales for use with different review definitions, and you can define different review components within a review definition. During a performance review, ratings for each objective are multiplied by the objectives' weightings, and then summed to give the overall calculated rating for the review.

For Siebel Competency Management, a rating scale can be defined for a different skill or shared across numerous skills. Ratings are used to define employee skill levels and to determine skill gaps.

This task is a step in [“Process of Setting Up Objectives and Reviews”](#) on page 44.

### ***To define a rating scale***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management > Review Configuration.
- 2 From the visibility filter, select Rating Scales.
- 3 In the Rating Scales list, add a new record, and then complete the fields.

The following table describes the fields in the rating scale record.

Field	Comments
Name	The name for the rating scale.
Description	Descriptive text for the rating scale.
Type	The type of rating scale. Options are Performance Management, which is used for rating performance on objectives, and Competency Management, which is used for competencies and skills levels.
Active	Automatically populated with a check mark that indicates the rating scale is active.

### ***To create rating values for the rating scale***

- 1 In the Rating Scales list, select the rating scale record.
- 2 In the Ratings list, add a new record, and then complete the fields.

Click Query to search for an existing rating record.

The following table describes the fields in the rating record.

Field	Comments
Name	The name of the rating scale.
Description	Descriptive text for the rating scale.
Rating	A whole number value for the rating. For example, the rating Did Not Meet Objective (0%) might have a rating of 1, and the rating Substantially Exceeded Objective (110%+) might have a value of 5.

Repeat this procedure to add ratings and values to the rating scale.

**CAUTION:** Do not delete a rating scale. If you no longer need the rating scale, make it inactive by changing the active flag for that rating scale. This is important to retain consistency of past reviews on the system that are using that rating scale.

## Defining Review Periods and Rollups

Siebel Objectives and Reviews allows organizations to conduct annual reviews that include components such as shared objectives (for example, the organization's core values), skills assessments, 360-degree evaluations, and rollups of periodic reviews.

Periodic reviews are used to evaluate the performance of each employee multiple times during the year. A typical periodic review cycle is assessment conducted on a quarterly basis.

If a review period definition includes a rollup of periodic reviews, the rollup period type for the review period record must be defined.

For example, if previous quarterly reviews are rolled up into an annual review, the Rollup Period Type for the Year period record is defined as Quarter. Then, the annual review ratings for the defined period include a rollup (the average) of the overall ratings from any completed quarterly reviews falling within the annual period.

**NOTE:** Review Periods and period units are defined using the Applications Administration screen. For more information on defining periods, see *Applications Administration Guide*.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44](#).

### *To change the rollup period type of a review period*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management > Review Configuration.
- 2 In the Review Periods list, select the record you want to edit, and then choose a value in the Rollup Period Type field.

The following table describes the fields in the review period record.

Field	Comments
Name	The name of the review period.
Description	A description of the review period, for example, October through December of 2002.
Period Type	The type of review period. The options are Day, Week, Bi-weekly, Month, Quarter, Half-Year, and Year.
Rollup Period Type	<p>This field is optional. Leave this field empty unless you intend to use the review period to roll up other reviews.</p> <p>If you want to roll up reviews, specify the type of period to roll up for this period type.</p> <p>A Period Type and Rollup Period Type combination of Year and Quarter specifies that the annual review overall rating can include a rollup (average) of the overall ratings from quarterly reviews completed during the year.</p>
Start Date	The start date for the period.
End Date	The end date for the period.



# Defining Review Components

Periodic and annual reviews include one or more review components. Examples of review components include employee objectives, shared objectives (such as company-wide core values), and skills assessments.

You can define review components using the Review Components view. After review components are defined, the components are associated with review definitions and are accessible to users during the objectives and review processes. You can also translate review component display names, such as tabs, into other languages.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44](#).

## Related Topics

[Translating Review Component Display Names on page 50](#)

[Creating Review Definitions on page 53](#)

### *To create a review component*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management Administration > Review Configuration.
- 2 From the visibility filter, select Review Components.

- 3 In the Review Components list, add a new record and complete the fields.

The following table describes some of the fields.

Field	Comments
Type	<p>The type of review component, choosing from the following options. Types include:</p> <ul style="list-style-type: none"> <li>■ Individual Objective 1-5. Objectives that are defined by individual employees. These objectives should only be used within a periodic review definition.</li> <li>■ Shared Objective 1-5. Objectives that are predefined by the organization. These objectives not editable by the employee. The review component can be used within a periodic or annual review definition.</li> <li>■ Rollup. Includes the average of previous periodic review ratings in the overall review rating.</li> <li>■ Skills. Assessment of employee skills that automatically updates the employee competencies within Competency Management when the review is approved. Skills assessment can be used within a periodic or annual review definition. Employees can propose new competency levels as part of a review, and managers should change the values if they believe the employee performs at a different competency level. Any levels that are changed during this process are reflected in the skill profile of the employee after the review is approved.</li> <li>■ Training Plan. Displays training course enrollments from the Training module. This review component can be used within a periodic or annual review definition.</li> <li>■ 360 Degree Evaluation. 360 degree evaluations can be used within a periodic or annual review definition.</li> </ul>
Name	Name of the review component.
Default Display	The display name of the component tab as it appears to the user.
Effective Date	The start date for the review component. This is the date on which the review component becomes active.
Active	A check mark indicates the review component is active.

## Translating Review Component Display Names

You can use the Display Translation view to translate review component display names, such as tabs, into other languages. This feature is useful when Siebel Objectives and Reviews is deployed within a multilingual environment. If the display translation is defined, end users who access the application with a foreign language pack see a translated display name for the tab. If the display translation is not defined for a user's language pack, the Default Display from the review component definition appears.

**To define display translations**

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management > Review Configuration.
- 2 From the visibility filter, select Review Components.
- 3 In the Review Components list select the review component, and then click the Display Translation view tab.
- 4 In the Display Translation list, add a new record, complete the fields, and save the record.

After you select the language, enter the translated text for the review component display name in the Display field.

## Creating Objectives Templates

Objectives Templates allow organizations to create and distribute predefined objectives. Employees whose review definitions include a review component with an objectives template automatically inherit the predefined objectives.

Objectives templates should only be used for Individual Objectives and Shared Objectives review component types.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44.](#)

**To create an objectives template**

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management > Review Configuration.
- 2 From the visibility filter, select Review Components.
- 3 In the Review Components list select the review component, and then click the Objectives Templates view tab.

**NOTE:** Objectives templates should only be created for Individual Objectives 1-5 or Shared Objectives 1-5 type review components. Individual Objectives can be edited by the employee. Shared Objectives are not editable by the employee.

- 4 In the Objectives Templates list, add a new record, and then complete the fields.

The total weight for all objectives must equal 100 percent.

The following table describes the fields in the objectives template record.

Field	Comments
Name	The name of the objective template.
Description	The template description.

Field	Comments
Sequence	The sequence of the objective.
Weight	The weight of the objective.  Weights for an objective template with a review component type Shared Objective should always add up to 100 percent.

- 5 When you have finished defining the objectives template, save the template.

## Defining 360-Degree Evaluation Forms

You use the Evaluation Forms view to associate 360-degree evaluation-type review components with specific evaluation forms. You can define a different 360-degree evaluation form for each type of work relationship that exists between evaluators and individuals who are evaluated.

For example, the form used for a peer evaluation can differ significantly from the form used for an upward evaluation. The definition of the 360-degree evaluation forms is administered using Siebel SmartScript.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44.](#)

### Related Topics

See *Siebel SmartScript Administration Guide*

### To define evaluation forms

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management > Review Configuration.
- 2 From the visibility filter, select Review Components.
- 3 In the Review Components list, select the review component, and then click the Evaluation Forms view tab.
- 4 In the Evaluation Forms list, add a new record, complete the fields, and then save the record.

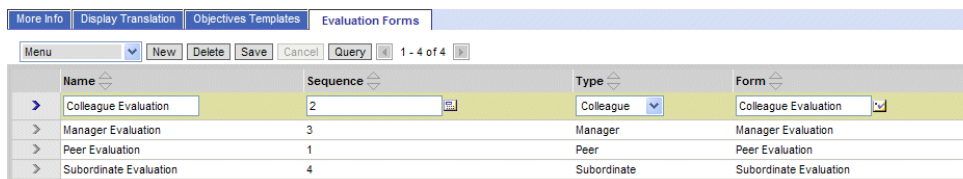
The following table describes the fields in the evaluation form record.

Field	Comments
Name	The name of the 360-degree evaluation type.
Sequence	The sequence number of the evaluation type.

Field	Comments
Type	<p>The type of 360-degree evaluation. Types include:</p> <p><b>Manager.</b> The evaluator is the superior to the employee that is being evaluated (downward evaluation).</p> <p><b>Subordinate.</b> The evaluator is the subordinate of the employee that is being evaluated (upward evaluation).</p> <p><b>Peer.</b> The evaluator is a peer of the employee that is being evaluated (peer evaluations).</p> <p><b>Colleague.</b> The employee that is being evaluated is a colleague of the evaluator.</p>
Form	The SmartScript that is used as the 360-degree evaluation form for the 360 degree evaluation type. The Pick SmartScript dialog box only lists SmartScripts with a 360 Evaluation type of SmartScripts.

Repeat this procedure to create as many evaluation forms as necessary.

Figure 7 shows the Evaluation Forms list including peer, colleague, subordinate, and manager evaluation types.



Name	Sequence	Type	Form
> Colleague Evaluation	2	Colleague	Colleague Evaluation
> Manager Evaluation	3	Manager	Manager Evaluation
> Peer Evaluation	1	Peer	Peer Evaluation
> Subordinate Evaluation	4	Subordinate	Subordinate Evaluation

Figure 7. Evaluation Forms List

## Creating Review Definitions

Review Definitions control the format and underlying processes used within objectives and reviews. These processes include the review type, required approval levels, and review components. Review definitions can also be created for specific organizations, divisions, and job families.

**CAUTION:** Do not modify or delete a review definition that has been used previously during an objectives and review cycle. Instead, create a new review definition with the desired effective date and inactivate the previous review definition. A review definition should not have more than one component of the same Objective Type.

The selection of review components within a review definition determines the format of the objectives and reviews process. For example, if Individual Objectives, Shared Objectives, and the Training Plan review components are added to a review definition, these components are accessible to employees during the objectives and review process.

The rating scale assigned to an Individual Objectives or Shared Objectives review component determines which rating scale the manager uses when rating the employee's performance in meeting those objectives. By defining the weights of the Individual Objectives and Shared Objectives review components as 75 percent and 25 percent, respectively, the resulting aggregate scores of each component are weighted accordingly when determining the calculated overall rating.

Organizations can control which review definitions are used by different employee subgroups by associating Divisions and Job Families with a review definition. The employee attributes are matched with review definition attributes, as indicated in the following list, to make sure the appropriate review definition is selected for each employee:

- The review definition is matched with the Organization, Division and Job Family.
- The review definition is matched with the Organization and Division.
- The review definition is matched with the Organization Job Family.
- The review definition is matched with the Organization.

**NOTE:** Only the objectives from the review component type **Individual Objectives 1** appear within the **All Employee Objectives** and **My Team's Objectives** tree views. For employee objectives to appear in these views, you must create an **Individual Objectives 1** review component and associate it with the desired review definition.

This task is a step in ["Process of Setting Up Objectives and Reviews" on page 44.](#)

### ***To create a review definition***

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Performance Management > Review Configuration**.
- 2 From the visibility filter, select **Review Definitions**.
- 3 In the **Review Definitions** list, add a new record, and then complete the fields.

The following table describes some of the fields.

Field	Comments
Active	A check mark indicates the review definition is active.
Description	A description of the review definition.
Effective Date	The start date for the review definition. This is the date on which the review definition becomes active.
Maximum 360 Evaluators	The maximum number of 360-degree evaluators that can be selected by an employee. If an employee submits a list of 360-degree evaluators exceeding the maximum number, an error message appears.
Minimum 360 Evaluators	The minimum number of 360-degree evaluators that can be selected by an employee. If an employee submits a list of 360-degree evaluators with fewer than the minimum number, an error message appears.

Field	Comments
Name	The name for the review definition.
Objectives Approval Levels	The level of management approval required for periodic reviews. Options are 0, 1, or 2. These values correspond to the number of managers who must review and approve an employee's periodic review.
Organization	The organization for which the review definition is defined.
Period Type	The period type for the review. For example, to create an annual review, set the period type to Year. To create a quarterly review, set the period type to Quarter.
Review Approval Levels	The level of management approval required for annual reviews. Options are 0, 1, or 2. These values correspond to the number of managers who must review and approve an employee's annual review.
Review Type	The type of review. For a periodic review, the type must be Periodic Review. For an annual review, the review type must be annual review.
Sequence	The sequence of the review definition. If more than one review definition with the same Period Type exists for an organization, the review definition with the highest sequence number applies.

## Managing Objectives and Reviews by Organization

Siebel Objectives and Reviews module defines the objectives and reviews period at the organization level. Each organization can have different review definitions assigned to it, but the organization must use the same period type.

By managing attributes at the organization level, you can control which objectives and reviews appear on the Performance Management Dashboard, All Employee Objectives, and My Team's Objectives views. In addition, you can also control the availability of the annual review by organization from the Performance Management Dashboard.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44.](#)

### *To manage organizations for Objectives and Reviews*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Group > Organizations**.
- 2 Click on the parent object in the Explorer to show suborganizations and then, in the Organizations list, select the organization.

- 3 In the Organization Entry form, complete the fields to configure the organization setting. The following table describes the fields in the organization record.

Field	Comments
Current Objectives Period	The name of the current objectives period. This name identifies which objectives period appears in the Performance Management Dashboard, All Employees Objectives and My Team's Objectives views. This value should match a value in the Name field in the Review Period Administration view.
Current Review Period	The name of the review period. This name identifies which review period appears in the Performance Management Dashboard. This value should match the Name field value in the Review Period Administration view.
Annual Review Start Offset	The number of days before an employee's Next Annual Review that the annual review link is active in the Performance Management Dashboard. A value of -N specifies that the annual review link is active N days before the employee's next annual review date.
Annual Review End Offset	<p>The number of days before an employee's Next Annual Review that the annual review link on the Performance Management Dashboard remains active. A value of +N specifies that the annual review link remains active N days after the employee's next annual review date. The annual review offset allows organizations to perform annual reviews on the anniversary date of the employee's last annual review date.</p> <p>Some organizations may choose to perform the annual review on the same date for all employees. In this case, the value in the Next Annual Review date field must be the same for each employee in the organization.</p>

## Defining Objectives Before the Next Period Begins

Before you can change the performance period, you must create objective records in the database for the next performance cycle. This task is typically performed as your organization begins reviews of current performance and before employees define new objectives.

This task is a step in [Process of Setting Up Objectives and Reviews on page 44](#).

### Related Topic

[Managing Objectives and Reviews by Organization on page 55](#)



***To create records for the new objective period***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management.
- 2 Select Performance Records Administration
- 3 From the visibility filter, select Performance by Period and query for the new objectives period.
- 4 Click Create Records.
- 5 In the Employees dialog box select the employees for which records will be created, and then click Create Selected Employee Records button.

You can click Create All Employee Records to create records for all employees in the system. Applicable employee records for the period appear in the Employee list.

**NOTE:** A review definition must exist that matches the employee for which you are creating records. If there is no review definition that applies to an employee, the system returns an error, canceling the Create Records process.

## Managing and Updating Objectives and Reviews

When necessary, you can update the status and details (including ratings and comments) for any employee's objectives and reviews, and view the employee's previous reviews. For example, you can override the status of an employee's review if it was mistakenly submitted.

Because of the sensitivity of employee review data, it is recommended that you only grant access to the All Employees Performance view to authorized personnel.

**NOTE:** As a best practice, a review that has already been approved and acknowledged by an employee should not be modified. If a decision is made to remove an employee objective, the administrator can access a specific review record for an employee and delete the period containing the objective from the list. The objectives reappear in the employee record if the employee restarts the review for the period. To make sure the review record does not reappear, the administrator must access the employee record, delete each individual objective, and then delete the review record for that period.

This task is a step in ["Process of Setting Up Objectives and Reviews" on page 44.](#)

***To override the review status***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Performance Management > Performance Records Administration.
- 2 From the visibility filter, select Performance by Period.
- 3 In the Period list, select the period, and then in the Employee list, query to locate the employee record.

- 4 In the employee record, change the value for Objective Status or Review Status as desired, and then save the record.

The following table describes objective status values.

Objectives Status	Comments
Not Started	Objectives have not been started by the employee.
Employee in Progress	Objectives are being defined by the employee.
Employee Submitted	Objectives have been submitted by the employee and are waiting for approval.
Manager Declined	Objectives have been declined by the manager and are accessible to the employee.
Manager Approved	Objectives have been approved by the manager and are awaiting approval by the next level manager. This status is only valid when the objectives require two levels of manager approval.
2nd Manager Declined	Objectives have been declined by the next level manager, and are accessible by the manager.
Completed	Objectives have received the required approvals and are posted to the All Employees Objectives and My Team's Objectives views.
Not Required	Objectives are not required. Objectives that are not required are counted in the Department Status Report.

The following table provides status information associated with reviews.

Review Status	Comments
Not Started	The employee has not started the self-review.
Employee in Progress	The employee has begun the self-review.
Employee Submitted	The employee has submitted the self-review to the manager. The manager is responsible for completing the review.
Manager in Progress	The manager is in the process of completing the review.
Manager Declined	The manager has declined the employee's self-review. The self-review is accessible to the employee.
Manager Approved	The review has been approved the manager and is awaiting approval by the next-level manager. This status is only valid when reviews require two levels of manager approval.
2nd Manager in Progress	The next-level manager is in the process of completing the review.
2nd Manager Declined	The next-level manager has declined the review. The review is accessible by the manager.

Review Status	Comments
2nd Manager Approved	The next level manager has approved the review. The review is ready for release to the employee by the manager.
Completed	The review has received all necessary approvals and is released to the employee for acknowledgement.
Acknowledged	The completed review has been acknowledged by the employee.
Not Required	The review is not required. Reviews that are not required are counted in the Department Status Report.
Evaluator List in Progress	The employee is in the process of completing the list of 360-degree evaluators.
Evaluator List Submitted	The list of 360-degree evaluators has been submitted for approval by the employee.
Evaluator List Approved	The list of 360 degree evaluators has been approved by the manager. Links to the 360-degree evaluation appear on the evaluator's Performance Management Dashboard, and the employee can begin the self-review.
Evaluator List Declined	The list of 360-degree evaluators has been declined by the manager and is accessible to the employee.
Pending Distribution Rating	The review is pending distribution approval from management. This status is only available when the administrator defines a rating distribution cycle using the compensation planning tool. For more information, see <a href="#">Chapter 7, "Working with Ratings Distributions."</a>

## Unlocking Approved Objectives for Midperiod Updates

Companies that want to allow employees to update their objectives in the middle of a period can unlock them for editing. This is useful when a new hire needs to begin the objectives process mid-period. When the administrator unlocks objectives, the objectives status is set to Not Started, and the approval process is repeated.

Objectives are unlocked at the organization level. A company may unlock objectives for organization A, but not for Organization B. The administrator can select all or some organizations when unlocking objectives.

This task is a step in ["Process of Setting Up Objectives and Reviews" on page 44.](#)

### **To unlock objectives**

- 1 From the application-level menu, choose [Navigate > Site Map > Administration - Performance Management](#).

- 2 From the visibility filter, select Performance by Period.
- 3 In the Performance by period list, select the period, and then click Unlock Objectives.
- 4 In the Select Divisions dialog box, perform one of the following tasks:
  - Click Unlock All Divisions, and confirm the choice.
  - In the list, select the divisions for the objectives you want to unlock, and click Unlock Selected Divisions.

## Performance Management for Direct Reports

In addition to managing their own performance objectives, managers can use the Performance Management Dashboard to manage performance-related tasks, such as evaluations and reviews, for their direct reports.

[Figure 8](#) shows the Performance Management Dashboard with the following elements:

- My Performance
- MyDirect Reports
- My Next-Level Reports
- Delegated Approvals
- 360-Degree Approvals lists

The left Navigation bar provides links to Team Objectives, All Employee Objectives, Corporate Objectives, the manager's performance (My Performance), My Team's Performance, the Department Status Report, and Ratings Distribution Report, an Employee by Rating Report, and a 360-degree Evaluations History.

This topic is included as part of ["Process of Setting Up Objectives and Reviews" on page 44](#).

### Related Topics

[Navigating the Manager's Performance Dashboard on page 61](#)

[Delegating a Performance Review on page 63](#)

Approving and Declining Submitted Performance Reviews on page 63

Performance Management Dashboard			
My Performance			
Name	Quarterly Objectives Q4 2002	Quarterly Review Q3 2002	Annual Review
Jason Rubin	Completed	Employee In Progress	9/15/2002

My Direct Reports			
Name	Quarterly Objectives Q4 2002	Quarterly Review Q3 2002	Annual Review
Howard Hunt	Completed	Completed	7/15/2003
Melissa Marks	Completed	Employee In Progress	10/15/2002
Pat Moore	Completed	Completed	10/15/2002
Ashley Parker	Employee Submitted	Manager In Progress	10/15/2002

My Next Level Reports			
Name	Quarterly Objectives Q4 2002	Quarterly Review Q3 2002	Annual Review
Martin Booth	Completed	Acknowledged	9/15/2002
David Carter	Not Started	Employee In Progress	10/15/2003
Rohit Gune	Completed	Employee In Progress	10/15/2002
Cindy Kline	Completed	Manager In Progress	7/15/2003
Jennifer Loft	Not Started	Completed	9/15/2002
Kim Masters	Employee Submitted	Employee In Progress	10/15/2002
Linda Matthew	Not Started	Completed	10/15/2003
Karen Nation	Not Started	Employee In Progress	10/15/2002
Chris Paulson	Completed	Employee In Progress	7/15/2003
Nicholas Ward	Not Started	Manager In Progress	10/15/2002
Randy Young	Not Started	Employee In Progress	4/15/2003

Delegated Approvals			
Name	Period	Type	Status
Kim Masters	Q4 2002	Objectives	Employee Submitted

360-degree Evaluations		
Name	Period	Status
Ed Abbo	2002	In Progress

Figure 8. Performance Management Dashboard

## Navigating the Manager's Performance Dashboard

In addition to providing links to the manager's individual performance views, the manager's performance dashboard provides links to the performance of direct reports and next-level direct reports. The Delegated Approvals list shows all approvals that are delegated to other managers, the type of delegation (objectives or review approvals) and the status of the delegated approval. The 360-degree Evaluations list shows the status of the scheduled evaluations.

The left navigation bar provides links to other screens and views that the manager can use to manage objectives, performance reviews, and analyses of his team's performance. Table 8 describes some of the performance screens that can be accessed using the navigation bar.

Table 8. Performance Management Screens

Screen	Description
My Team's Objectives	An explorer tree of the team's hierarchy. The objectives of the selected team member are displayed at the right of the explorer tree.
All Employees Objectives	An explorer tree showing the hierarchy of all employees in the organization. The objectives of the selected employee are displayed at the right of the explorer tree.

Table 8. Performance Management Screens

Screen	Description
Corporate Objectives	Displays the organization's high-level goals. The Quick Picks list provides navigation links to related objectives such as an executive summary, core values, and frequently asked questions.
My Performance	Provides a history of objectives and reviews for the manager, including the status, overall rating, and whether the review is acknowledged. Click the links for each period to navigate to details for each performance period.
My Team's Performance	Lists the manager's reports and provides a performance history and status for each report. Click the Last Name link for the employee to view employment history. Click the Period link to view the details of the direct report's performance for each period.
Department Status Report	Provides an overview of the status of each manager's reviews, such as how many objectives and reviews are due, how many have been completed, and so on. The objectives and review status for each of the manager's direct reports is also displayed. The manager can click the Name link for each direct report and review the status of that manager's direct reports.
Ratings Distribution Report	Provides a Ratings Distribution matrix for each of the manager's direct reports for periodic and annual reviews.
Employee by Rating Report	Lists the manager's direct reports and shows the distribution rating for each for annual and periodic reviews and whether or not the distribution rating is approved.
360-degree Evaluation History	Lists the employees that are scheduled for a 360-degree evaluation, when the evaluation occurs, and the status of the evaluation.

This topic is included in ["Process of Setting Up Objectives and Reviews" on page 44.](#)

### Related Topics

[Performance Management for Direct Reports on page 60](#)

[Delegating a Performance Review on page 63](#)

[Approving and Declining Submitted Performance Reviews on page 63](#)

## Delegating a Performance Review

Managers can delegate a performance review and then check the status of each delegated review from the Performance Dashboard. Review managers can only delegate a review to another review manager, and a second-level review manager can only delegate reviews to another second-level review manager.

Managers can preview the status of delegated reviews using the Delegation Indicator on the Performance dashboard.

This task is a step in “[Process of Setting Up Objectives and Reviews](#)” on page 44.

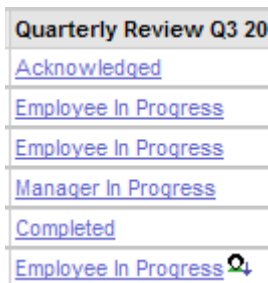
### *To delegate a review to another manager*

- 1 From the Performance Management Dashboard, locate the employee in the My Direct Reports list.
- 2 In the Employee record, click the link Review Status.  
For example, the column might be labeled Quarterly Review, and the link might reflect the status Employee In Progress.

The Review page for the employee appears.

- 3 From the Review page, click Delegate Review Manager, and from the delegate dialog box, select the manager.

As the following figure shows, a Review Delegated icon appears next to the Review link in the manager's Performance Management Dashboard.



## Approving and Declining Submitted Performance Reviews

After an employee completes a self-assessment, the employee submits the review to a manager who then reviews the employees achievements against objectives. The manager add comments to the self assessment, provides a rating, and then approves or declines the review.

In a multitiered organization, if the manager accepts the review, it is automatically moved to the next-level manager for approval. In some organizations, multiple managerial reviews are not required, and an approved review is returned to the employee for review, discussion, and acknowledgement.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44.](#)

***To accept or decline a submitted review***

- 1** Navigate to the Performance Management Dashboard.
- 2** In the My Reports list, select the employee and click the Review Status link.  
The status of the review should be Employee Submitted or Manager in Progress.
- 3** On the Review page, click the Objectives view tab to view the employee’s objectives.
- 4** For each objective listed, add your comments in the manager results textbox and assign a rating in the rating field.
- 5** (Optional) If your company decides to use the skills component on a review, a manager can click the Skills view tab, and add skills.  
The skills profile is updated with new skills and skill levels when the review is completed.
- 6** Click the Summary tab.  
The calculated rating from all the individual scores entered for each objectives appears.
- 7** Using the calculated rating score as a reference, enter the final rating for the employee in the overall rating field.
- 8** Click the Comments view tab, and then add overall review comments.
- 9** Click Approve or Decline.  
After the review is approved, the manager’s comments are released for employee viewing.  
If the review is declined, the manager’s comments are not visible to the employee. The employee must resubmit the review to the manager after revision.

## Copying Previous Objectives (End User)

An employee’s objectives may not change much from period to period. In this case, when defining objective for a new period, an employee can copy a similar objective from the previous period and edit the old objective as needed.

This task is a step in [“Process of Setting Up Objectives and Reviews” on page 44.](#)

***To copy a previous objectives to the new period***

- 1** Navigate to the Objectives screen, and click Copy Previous Objectives.  
A list of objectives sorted by date appears.
- 2** Select the objective to copy, and then click OK.  
The objective is automatically copied to the current period’s list of objectives.
- 3** In the Objectives list, edit the copied objectives to reflect the requirements for the current period



## Adding Performance Assessments During the Cycle (End User)

Managers and employees do not need to wait to the end of the performance cycle to begin entering performance assessment comments for objectives.

Immediately after a new objective is created, the comments field is available for employees and managers to start detailing progress and entering other objective-related information. The comments remain private until an employee submits the review to the manager. At this point, the employee comments are visible to the manager but the manager's comments are not yet visible to the employee.

For example, an employee might have an objective that requires completing a project by a certain date. As soon as the employee meets the objective, the employee can navigate to the objective and enter details about the achievement. When the company-mandated self-assessment period begins, the employee can add any remaining details in the up-to-date self-assessment.

At the same time, managers can also add their own notes on performance by direct reports during the performance cycle. When the review process begins, managers who have routinely recorded achievements by direct reports have the data they need to do the assessment.

## Tracking Progress on Objectives (End User)

Employees can update the progress on each objective at any time during the objectives and reviews cycle. During the employee's review, the manager can modify the progress value to reflect the manager's assessment of progress towards achievement of each goal.

### ***To update the status of an objective***

- 1 Navigate to the Performance Dashboard and select an objective.
- 2 In the Progress Status field, select the appropriate progress value.

This status appear in graphic form next to the objective in the All Employee Objectives list.



# 6

## Setting Up Compensation Planning

Siebel Compensation Planning allows organizations to plan merit-based and promotion-based salary increases, cash bonuses, and stock grants. Organizations can define compensation budgets, guidelines, and eligibility rules. Managers can develop compensation plans for their direct and indirect reports and then submit the plans for multiple levels of approval.

This chapter describes setting up and administering Siebel Compensation Planning. It includes the following topics:

- [Scenario for Compensation Planning on page 68](#)
- [Process of Setting Up Compensation Planning on page 68](#)
- [Creating a Salary Grade on page 69](#)
- [Creating a Salary Plan on page 70](#)
- [Adding a Salary Grade to a Salary Plan on page 70](#)
- [Creating a Job Family on page 71](#)
- [Creating a Job Code on page 72](#)
- [Employee Information Updates for Compensation on page 73](#)
- [Creating Compensation Guidelines on page 73](#)
- [Defining Compensation Eligibility Rules on page 75](#)
- [Defining the Compensation Plan Rollout on page 76](#)
- [Managing Compensation Budgets on page 77](#)
- [Defining Compensation Planning Cycles on page 82](#)
- [Associating a Compensation Component with a Planning Cycle on page 83](#)
- [Generating and Releasing Compensation Plans on page 84](#)
- [Viewing All Compensation Plans on page 85](#)
- [Viewing Employee Compensation History on page 85](#)
- [Navigating the Compensation Planning Screen \(Managers\) on page 86](#)
- [Selecting the Compensation Plan for Rollout on page 88](#)
- [Defining Compensation Changes for Direct Reports on page 89](#)
- [Adding Justification Comments to the Compensation Plan on page 90](#)
- [Tracking Compensation Plan Recommendations Status on page 91](#)
- [Submitting a Compensation Plan for Approval on page 91](#)
- [Approving and Rejecting a Compensation Plan on page 92](#)

- [Assigning Compensation Support Team Members to Employees on page 92](#)
- [Exchange Rates for Compensation Planning on page 94](#)

## Scenario for Compensation Planning

This scenario provides an example of a process performed by a compensation plan administrator and manager. Your company may follow a different process flow according to its business requirements.

### Administrator

Following organizational guidelines, a compensation administrator structures the company's employee and financial information as part of the compensation planning process.

The administrator establishes salary grades and salary plans, defines individual job codes and job family categories, verifies that employee information is up-to-date, and creates compensation guidelines and eligibility rules. The administrator defines the planning cycles with associated components and then creates budgets for each type of compensation that is included in the compensation plan.

After the definition process is completed, the administrator generates compensation plans for use by each manager participating in the planning process. The administrator reviews the compensation plans as well as the compensation history for each employee in the organization.

### Manager

An organization's marketing director manages eight direct reports who, in turn, supervise numerous direct reports of their own. Each quarter, the organization's directors plan the compensation for each of their direct and indirect reports.

Using Siebel Compensation Planning, the marketing director defines the merit increase for each eligible employee based on guidelines established by the organization. For each employee who is eligible for a promotion, the director selects a new job code for the employee and specifies an increase in salary. The director then gives each eligible employee a percentage of his or her bonus target, based on the most recent annual review rating or another factor that might have been set up by the administrator. Finally, the director allocates a number of stock options to each eligible employee following guidelines based on the annual review rating.

After reviewing the compensation increases, the director adjusts the compensation for several employees to reduce the variance between the amounts allocated and the budget. The director then submits the compensation plan to his manager for approval.

## Process of Setting Up Compensation Planning

The following lists show the procedures that administrators and managers typically perform to set up and use Compensation Planning. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up compensation planning, perform the following procedures:

- 1 [Creating a Salary Grade on page 69](#)
- 2 [Creating a Salary Plan on page 70](#)
- 3 [Creating a Job Family on page 71](#)
- 4 [Creating a Job Code on page 72](#)
- 5 [Employee Information Updates for Compensation on page 73](#)
- 6 [Creating Compensation Guidelines on page 73](#)
- 7 [Defining Compensation Eligibility Rules on page 75](#)
- 8 [Defining the Compensation Plan Rollout on page 76](#)
- 9 [Managing Compensation Budgets on page 77](#)
- 10 [Defining Compensation Planning Cycles on page 82](#)
- 11 [Generating and Releasing Compensation Plans on page 84](#)

## End-User (Manager) Procedures

To use compensation planning, perform the following procedures:

- 1 [Viewing All Compensation Plans on page 85](#)
- 2 [Viewing Employee Compensation History on page 85](#)
- 3 [Selecting the Compensation Plan for Rollout on page 88](#)
- 4 [Defining Compensation Changes for Direct Reports on page 89](#)
- 5 [Adding Justification Comments to the Compensation Plan on page 90](#)
- 6 [Tracking Compensation Plan Recommendations Status on page 91](#)
- 7 [Submitting a Compensation Plan for Approval on page 91](#)
- 8 [Approving and Rejecting a Compensation Plan on page 92](#)
- 9 [Assigning Compensation Support Team Members to Employees on page 92](#)

# Creating a Salary Grade

As an administrator, you create salary grades as the first step in establishing salary ranges within the organization.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To create a salary grade*

- 1 From the application-level menu, choose [Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Salary Administration](#).

- 2 From the visibility filter, select Salary Grades.
- 3 In the Salary Grades list, add a new record, and then complete the name and description fields.
- 4 Select the check box in the Active field to activate the salary grade.

## Creating a Salary Plan

Salary plans define the salary range as defined by each salary grade. To create the association between an employee and a salary range, a salary plan, and a salary grade is specified for each employee.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68.](#)

### *To create a salary plan*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Salary Administration.
- 2 From the visibility filter, select Salary Plans.
- 3 In the Salary Plans list, add a new record, and then complete the name and description fields.
- 4 In the Salary Plan record, select the check box in the Active field to activate the salary plan.

## Adding a Salary Grade to a Salary Plan

Before you can add a Salary Grade to a Salary Plan, the Salary Grade and Salary Plan records must be created. To modify an existing salary range within a salary plan, create a new effective dated row within the Salary Plan's Salary Grade list.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68.](#)

### *To add a salary grade to the salary plan*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Salary Administration.
- 2 From the visibility filter, select Salary Plans.
- 3 In the Salary Plans list, select the salary plan.
- 4 In the Salary Grades list, add a new record, and then click the select button in the Salary Grade field.
- 5 In the Pick Salary Grade dialog box, query to locate a salary grade to include with the salary plan, and then click OK.

**6** Complete the fields for the salary grade.

The following table describes the fields in the salary grade record.

Fields	Comments
Active	Selecting the check box activates the salary grade.
Currency	The currency code for the salary grade.
Effective Date	The date on which the salary grade is active. The Active check box must be selected for the salary grade to be activated on the specified date.
Max Salary Range	The maximum salary for the salary grade.
Min Salary Range	The minimum salary for the salary grades.
Salary Range 25th Percentile	Enter the 25th percentile salary for the salary grade.
Salary Range 75th Percentile	Enter the 75th percentile salary for the salary grade.
Salary Range Midpoint	Enter the midpoint salary for the salary grade. This value is used to calculate a compa-ratio for the employee.

Repeat this procedure for each salary grade you want to add to the salary plan.

## Creating a Job Family

Job families are created to group job codes that have a common function but may differ in complexity, scope, or level.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To create a job family*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Job Administration.
- 2 From the visibility filter, choose Job Families.
- 3 In the Job Families list, add a new record, and then complete the fields.

The following table describes the fields in the job family record.

Field	Comments
Active	A check mark indicates that the job family is active.
Description	Enter a description for the job family.

Field	Comments
Effective date	The date on which the selected job family becomes available.
Job Family	Enter a name for the job family.

## Creating a Job Code

Job codes are a common attribute in applications used by Human Resources professionals to link employees with specific job attributes defined by your organization, and to identify job types and titles. Job code attributes can include a salary grade, job family, Fair Labor Standards Act (FLSA) status, and Equal Employment Opportunity (EEO) category.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68.](#)

### *To create a job code*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Job Administration.
- 2 From the visibility filter, select Job Codes.
- 3 In the Job Codes list, add a new record, and then complete the fields.

The following table describes the fields in the job code record.

Fields	Comments
Job Code	Unique number for the job code.
Job Code Name	The name of the job code.
Job Family	The Job Family associated with the Job Code. The Job Family must exist to select it here.
Salary Grade	The Salary Grade associated with the Job Code. the Salary Grade must exist to select it here.
EEO Category	Equal Employment Opportunity job category of the technical professional. Choose the best-fit category.
FLSA Status	Exempt or nonexempt status for FLSA (Fair Labor Standards Act).
Active	Selecting the check box activates the job code.
Effective Date	The date on which the job code is active. The Active check box must be selected for the job code to be activated on the specified date.



## Employee Information Updates for Compensation

As part of the administrative process, employee job information is verified and maintained for accurate compensation results. Employee job information such as Employment Status, Employee Type, Job Code, Salary, and so on, should be updated on a regular basis to produce accurate results for the compensation planning process. For more information, see [“Setting Up and Modifying Employee Information” on page 36](#).

**NOTE:** Make updates to employee job information before creating a compensation plan. Subsequent changes to an employee's job information are not reflected in existing compensation plans.

### Related Topic

[Process of Setting Up Compensation Planning on page 68](#)

## Creating Compensation Guidelines

Siebel Compensation Planning allows organizations to establish compensation guidelines for merit, variable pay, and stock. These compensation guidelines are specific to a salary plan and salary grade combination and can be based on factors such as annual review ratings, company ratio, and salary quartiles. Managers can use these guidelines during the planning process when deciding merit increases, bonus amounts, and stock grants for each employee.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#), and includes a number of related tasks.

### Related Tasks

- [Associating a Compensation Salary Plan and Grade with the Guideline Table on page 74](#)
- [Defining Compensation Guideline Ranges on page 75](#)

### *To create a guideline*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration.
- 2 From the visibility filter, select Guidelines.
- 3 In the Guidelines list, add a new record, and then complete the fields.

The following table describes the fields.

Field	Comments
Name	A descriptive name for the guideline.
Description	A description for the guideline.

Field	Comments
Type	The type of guideline. Examples are Merit, Variable Pay, Promotion, and Stock.
Effective Date	The date the guideline is effective.
Active	Selecting the check box activates the guideline.

## Associating a Compensation Salary Plan and Grade with the Guideline Table

The Guideline Table is used to associate salary plan and salary grade combinations with compensation guidelines and their corresponding factors.

### *To associate a salary plan and grade with a guideline*

- 1 In the Guidelines list, select the guideline.
- 2 In the Guideline Table list, add a new record and complete the fields.

The following table describes the fields in the guideline table record.

Field	Comments
Salary Plan	The salary plan for which the guideline applies. The salary plan is used in combination with the selected salary grade.
Salary Grade	The salary grade for which the guideline applies. The salary grade is used in combination with the selected salary plan.
Factor 1	<p>The factor used in determining the guideline.</p> <p>Examples are:</p> <ul style="list-style-type: none"> <li>■ Periodic Review. The most recent periodic review rating from Siebel Objectives and Reviews.</li> <li>■ Annual Review. The most recent annual review rating from Siebel Objectives and Reviews.</li> <li>■ Compa-Ratio. The salary and salary range midpoint.</li> <li>■ Salary Quartile. The salary quartile based on the salary range.</li> </ul>
Factor 2	(Optional) A second factor used in determining the guideline.

### Related Topic

[Creating Compensation Guidelines on page 73](#)

## Defining Compensation Guideline Ranges

Guideline Ranges determine the minimum, maximum, and target guideline values for merit, variable pay, and stock awards. For merits and variable pay, the minimum, maximum, and target amounts entered should represent a percentage. For stock, the amounts entered should represent the actual number of shares.

### To set guideline ranges

- 1 In the Guidelines list, select the guideline.
- 2 In the Guideline Table list, select the guideline.
- 3 In the Guideline Ranges list, add a new record and complete the fields.

The following table describes the fields in the guideline ranges record.

Field	Comments
Factor 1 - Low Value	The low value of the range for the first factor that is considered.
Factor 1 - High Value	The high value for the first factor that is considered.
Factor 2 - Low Value	The low value of the range for a second, optional factor.
Factor 2 - High Value	Enter the high value of the range for Factor 2. There are four preconfigured factors to choose from: <ul style="list-style-type: none"> <li>■ Annual review score</li> <li>■ Periodic review score</li> <li>■ Compa-ratio</li> <li>■ Salary quartile</li> </ul>
Minimum	The guideline minimum amount.
Maximum	The guideline maximum amount.
Target	The guideline target amount.
Default	The default percentage value to be applied when an employee's Factor 1 and Factor 2 combination do not match a row in the table.

### Related Topic

[Creating Compensation Guidelines on page 73](#)

## Defining Compensation Eligibility Rules

Employee eligibility for compensation changes can vary from one compensation type to another, as well as from one planning cycle to the next. You can define eligibility rules to determine which employees are eligible for which types of compensation change. Eligibility rules can also be used to control which employees have budgets calculated for them.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### ***To create an eligibility rule***

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration**.

- 2 From the visibility filter, select **Eligibility Rules**.

- 3 In the Eligibility Rules list of employees, query to find the employees that meet eligibility rule criteria.

The query's resulting list of employees is the eligibility rule. Eligibility rule information is defined for each employee in the **More Info** form's **Eligibility Rules** section.

- 4 In the Application-level menu, click **Query**, and then select **Save Query As (ALT + S)** to save the eligibility rule.

In the **Save Query As** dialog box, enter a name for the eligibility rule and then click **OK**.

You can refine the eligibility rule criteria by clicking the menu button and choosing **Refine Query**.

After an eligibility rule has been saved, you select it from the **Planning Cycles and Budgets** views.

**NOTE:** Eligibility determines the ability to plan compensation changes for specific employees. You can manually override eligibility for specific employees within a compensation plan by accessing the plan through the **All Compensation Plans** or **All Compensation Plans Across Organizations** views.

### **Related Topics**

[Managing Compensation Budgets on page 77](#)

[Defining Compensation Planning Cycles on page 82](#)

## Defining the Compensation Plan Rollout

Siebel Compensation Planning allows organizations to select the management levels within the organizational hierarchy that participate in the compensation planning process. The term *plan rollout* refers to the determination and control over which managers participate in the planning process. A compensation plan is automatically created for each manager who participates in the planning process. For more information, see [“Defining Compensation Planning Cycles” on page 82](#).

Participation in the compensation planning process is defined using **Administration - Group > Positions**. First, positions are identified as business unit leaders. Then, the number of levels below the business unit leaders that participate in the planning process is specified.

**Figure 9** shows an identified business unit with levels. In this example, if John's position (Level 1) is selected as a business unit leader with one level below, then Mark, Jane, and Chris (Level 2) would also have compensation plans created for them. Employees in Level 3 and Level 4 are automatically rolled up into Level 2 compensation plans during the plan creation process.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68.](#)

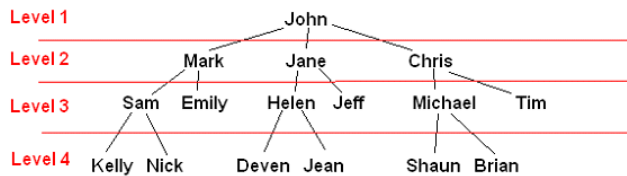


Figure 9. Business Unit with Levels

### To define the compensation plan rollout

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Group > Positions**.
- 2 In the Positions list, query to find the position of the employee you want to designate as a business unit leader.
- 3 In the Positions Entry form, enter the number of levels that are participating in the planning process in the **Compensation Plan Rollout** field.

Include the business unit leader and each level below the position in the number that you enter.

The following table describes the values you can use when planning the compensation plan rollout.

Value	Comments
1	Only this position is able to plan.
2 through N	This position and positions N - 1 levels below are able to plan.
NULL	The position inherits plan rollout from parent position.
0	This position cannot plan. Positions below with Compensation Plan Rollout = NULL continues to inherit plan rollout from parent position.
-1	This manager cannot plan. Positions below with Compensation Plan Rollout = NULL cannot plan.

## Managing Compensation Budgets

Compensation planning involves creating and maintaining budgets for each type of compensation.

Before the planning process can begin, you must define a budget for each type of compensation included in the compensation plan. For each compensation type, you can create a logical expression to calculate the budgeted amount for each employee.

During the budget calculation process, a record is created for each employee within the Employees list using the evaluated expression.

This step in [Process of Setting Up Compensation Planning on page 68](#) includes a number of related tasks.

**Related Tasks**

- [Creating a Compensation Budget and Budget Type on page 78](#)
- [Compensation Budget Expressions on page 79](#)
- [Calculating the Compensation Budget on page 80](#)
- [Locking the Compensation Budget on page 80](#)
- [Adding Employees to the Locked Compensation Budget on page 81](#)

## Creating a Compensation Budget and Budget Type

Budget records are created for employees who meet the following criteria:

- The employee record has an Employee Type designation of Employee.
- The employee has an employment status of Active, Leave of Absence, or Paid Leave of Absence  
Employee status is accessed using the Administration - Employee view.
- The employee meets each eligibility rule applied to the budgeting process.

***To create a budget***

- 1** From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration
- 2** From the visibility filters, select Budgets.
- 3** In the Budgets list, add a new record and complete the fields.

The following table describes the fields in the budget record.

Field	Comments
Name	The name of the budget.
Period	Select the period that the budget covers. The Start and End fields are populated after you select a period.
Start	Start of the budget effective period.
End	Expiration date for the budget.
Description	Description of the budget.
Organization	The organization associated with the budget.
Currency	The currency code for the budget.

Field	Comments
Exchange Date	The currency exchange date used in the planning cycle. This date must be specified when multicurrency planning occurs.
Last Run	Indicates the date and time of the last budget calculation.
Status	A system-generated value. Values are New, Calculated and Locked. For more information, see <a href="#">“Locking the Compensation Budget” on page 80</a> .
Active	Select the check box to activate the budget.

### ***To create budget types for the budget***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration.
- 2 From the visibility filters, select Budgets.
- 3 In the Budgets list, select the budget.
- 4 In the Budget Types list, add a new record and complete the fields.

The following table describes the fields in the budget type record.

Field	Comments
Budget	The total budget amount. This field is automatically completed when the budget is calculated. The application aggregates budget amounts for the employees associated with the selected budget type in the selected period.
Budget Spent	The total budget spent amount. The application aggregates budget spent amounts for the employees associated with the selected budget type in the selected period.
Eligibility Rule	An eligibility rule to indicate which employees have budgets created for them.
Expression	An expression used to calculate the budget amount.
Type	The compensation type for which you want to calculate a budget. Values include Merit, Promotion, Variable Pay, and Stock.

### **Related Topic**

[Managing Compensation Budgets on page 77](#)

## **Compensation Budget Expressions**

You can create budget expressions that are used to calculate the budgets. A budget expression is a formula that can include any field within the ERM Employee business component including Employee Salary, Employee Job Code, Employee Salary Grade, and so on.

Several standard functions are supported, allowing budget calculations to include arithmetic, Boolean, and conditional operators. For more information on syntax and functions that can be used in budget expressions, see *Siebel Tools Online Help*, *Using Siebel Tools*, and *Configuring Siebel eBusiness Applications*.

**NOTE:** If the employee salary (in the Job Information section of the employee record) is entered using a currency different from the budget currency, the employee salary is converted to the budget currency during the calculation of the budget amount. The Employee Salary field must be the first field to appear within the expression for the currency conversion to be successful.

### Related Topic

[Managing Compensation Budgets on page 77](#)

## Calculating the Compensation Budget

After the budget definition (including the desired budget expressions) have been defined, you can begin the budget calculation.

**NOTE:** The budget calculation process should only be run in a server environment. Running the budget calculation process on a mobile or dedicated client is not recommended.

The budget calculation can take several minutes to complete depending on the number of employees and complexity of the budget expressions. During the calculation process, you can periodically press ALT + ENTER to refresh the screen and update the budget status.

### *To calculate the budget*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration.
- 2 From the visibility filters, select Budgets.
- 3 In the budgets list, select the budget, and then click Calculate.
- 4 Verify that the budget calculation is completed by reviewing the status field in the budget record.  
When the calculation is completed, the budget status is Calculated.

### Related Topic

[Managing Compensation Budgets on page 77](#)

## Locking the Compensation Budget

After a budget is calculated, you can lock the budget record to prevent further calculations. Budget Types and Employee records can be manually updated as needed by temporarily unlocking the budget record.



Locked budgets can be linked to one or more planning cycles for incorporation into the associated compensation plans. After final approval of a compensation plan, the approved compensation change amounts for an employee are reflected in the Budget Spent fields in the Budget Types and Employees lists.

**CAUTION:** Running the budget calculation process results in the unrecoverable loss of the Budget and Budget Spent amounts for any previously calculated budget records. When necessary, individual Budget and Budget Spent amounts can be manually updated.

### ***To lock a compensation budget***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration.
- 2 From the visibility filter, choose Budgets.
- 3 In the Budgets list, query to find the budget.
- 4 In the Budget record, select Locked in the Status field.

**NOTE:** Budgets are unlocked by changing the status to Calculated.

### **Related Topic**

[Managing Compensation Budgets on page 77](#)

## **Adding Employees to the Locked Compensation Budget**

When you select a budget type, you also select an eligibility rule which is made up of eligible employees. Other employees who are not covered by the eligibility rule can be added to the compensation budget, after a budget is locked.

### ***To add an employee to a locked budget***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning Administration.
- 2 From the visibility filter, choose Budgets.
- 3 In the Budgets list, query for the budget, and in the budget record, change the value in the Status field to Unlocked.
- 4 In the Budget Types list, select the appropriate compensation type for the employee.
- 5 In the Employees list, add a new record and then click the select button in the Last Name field.
- 6 In the Pick Employee dialog box, query to locate the employee you want to add, and then click OK.
- 7 Complete the remaining fields.

**Related Topic**[Managing Compensation Budgets on page 77](#)

## Defining Compensation Planning Cycles

You must create a planning cycle before initiating the compensation planning process. A planning cycle definition determines which period, budget, guidelines, eligibility rules, and compensation types are incorporated into a compensation planning cycle. After a planning cycle has been defined, the associated compensation plans can be created and released to the managers to begin the planning process.

This task is a step in [Process of Setting Up Compensation Planning on page 68](#).

***To create a planning cycle***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning.
- 2 From the visibility filter, select Planning Cycles.
- 3 In the Planning Cycles list, add a new record and complete the fields.

The following table describes some of the fields.

Field	Comments
Name	The name of the planning cycle (for example, Q2 2002 Merits and Promotions).
Description	A description of the planning cycle.
Organization	This field is automatically populated with the organization associated with the planning cycle based on the budget.
Budget	The budget record associated with the planning.
Exchange Date	The currency exchange date used in the planning cycle. This date must be specified when multicurrency planning occurs.
Period	The compensation plan period. This choice provides the values for the Plan Start and Plan End fields.
Plan Start	A read-only field that shows the start date of the compensation plan period, based on the period selection.

Field	Comments
Plan End	A read-only field that shows the end date of the compensation plan period, based on the period selection.
Status	<p>This field displays the planning cycle status. The following values indicate status:</p> <ul style="list-style-type: none"><li>■ New. The plan creation process has not been invoked.</li><li>■ In Progress. The plan creation process is in progress.</li><li>■ Done. The plans have been created, but have not been released to managers for planning.</li><li>■ Locked. The plans have been created and released to managers for planning.</li></ul>

**Related Topic**

[Associating a Compensation Component with a Planning Cycle on page 83](#)

## Associating a Compensation Component with a Planning Cycle

A planning cycle must have at least one compensation component associated with it. For each planning cycle, the list of associated components determines which component tabs (Merits, Promotions, Variable Pay, Stock, and so on) are accessible to managers during the planning process. The plan start and plan end dates are part of the planning cycle itself and apply to all components within it.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

**Related Topic**

[Defining Compensation Planning Cycles on page 82](#)

***To associate a compensation component with a planning cycle***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning.
- 2 From the visibility filter, select Planning Cycles.
- 3 In the Planning Cycles list, select the planning cycle.

- 4 In the Components list, query for a component type.

The following table describes the component fields.

Field	Comments
Name	The name of the compensation component.
Type	The compensation type (for example, Merit, Promotion, Variable Pay, Stock).
Guidelines	The guideline associated with the compensation component.
Eligibility Rule	The eligibility rule associated with the compensation component.
Transaction Effective Date	The transaction effective dates of a merit, promotion, bonus, or stock grant transaction. Specifying one or more of these dates per compensation type provides control of dates from which managers can select when determining the effective dates of salary increases, promotions, bonus payouts, and stock grants.

## Generating and Releasing Compensation Plans

After the planning cycle definition is completed, the actual compensation plans are generated. The compensation plan generation process creates a plan for each manager participating in the planning process, in accordance with the compensation plan rollout settings. For more information, see [“Defining the Compensation Plan Rollout” on page 76](#).

**NOTE:** The plan creation process should only be run in a server environment. Running the plan creation process on a mobile or dedicated client is not recommended.

When the plan creation process is complete, the planning cycle is locked, releasing the generated compensation plans so that managers can begin planning. Planning cycles should not be locked until after the cycles have been verified as ready for release.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To generate compensation plans*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Compensation Plan Rules Administration.
- 2 From the visibility filter, select Planning Cycles.
- 3 In the Planning Cycles list, select the planning cycle, and then click Create Plans.
  - During compensation plan creation, a status of In Progress appears in the Status field. When the compensation plan creation process is completed, Done appears in the status field.

- After the plans are created, they are accessible in the All Compensation Plans view. The plans must be released so that managers can begin the planning process.

**CAUTION:** Running the plan creation process for a planning cycle that is locked results in the unrecoverable loss of any previously planned compensation within that planning cycle.

### ***To release compensation plans***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning Administration > Budgets.
- 2 From the visibility filter, select Planning Cycles.
- 3 In the Planning Cycles list, locate the compensation plan.
- 4 In the compensation plan record, change the status to Locked in the Status field.

## **Viewing All Compensation Plans**

Administrators and managers participating in the rollout can view compensation plans using the All Compensation Plans and All Compensation Plans Across Organizations views. The All Compensation Plans view lists compensation plans associated with users in the organization. The All Compensation Plans Across Organizations view shows each compensation plan across all organizations. Compensation plans accessed through these views are editable and can be submitted, approved, and declined as needed.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### ***To view compensation plan detail***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning Administration > Employee Workbook Administration.
- 2 From the visibility filter, select All Compensation Plans.
- 3 In the All Compensation Plans list, select the compensation plan record, and then click the link in the Name field.

## **Viewing Employee Compensation History**

Administrators and managers can view the compensation plan history for each employee using the All Employees Compensation History view. This view is useful when assessing compensation planning results for a specific employee.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

***To view the compensation history for an employee***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Compensation Planning > Employee Workbook Administration.
- 2 From the visibility filter, select All Employees Compensation History.
- 3 In the Employees list, query to find the employee whose history you want to view.
- 4 In the history list, query to locate compensation plan information.

## Navigating the Compensation Planning Screen (Managers)

From the Compensation Planning screen, managers can make compensation recommendations, review compensation plan submission status, the budget status, and plans for direct and indirect reports, as well as approve, decline and submit plans. Managers also can view compensation plan and budget details, check and adjust the direct report's fit with overall team ratings, and enter compensation details for each component using the view tabs. [Figure 11 on page 100](#) shows an example of the Compensation Planning screen, with component view tabs.

### Navigation Bar Links

The navigation bar at the top of the screen provides links to employee compensation information. [Table 9](#) describes the links.

Table 9. Compensation Planning Screen Navigation Links

Navigation Link	Description
My Workbook List	Shows the My Compensation Plans list from which the user can query for additional plans, and a form that provides details about the selected compensation plan.
Team Workbook List	Shows read-only budget information about the selected compensation plan (Budget view). From the Compensation Plans list the user can query for additional compensation plans, and approve, decline or submit the selected compensation plan.
Team Summary List	Shows read-only compensation summary information for each of the compensation plan owner's direct reports. Details include eligibility, the job code, annual rating, current salary, merit percent and compa ratio for each selected employee.

Table 9. Compensation Planning Screen Navigation Links

Navigation Link	Description
Support Team Workbook List	Lists members of the support team associated with the manager's team of direct reports. Details include the support team member's position, responsibility, and the employee type.
Support Team Summary List	Shows compensation details for each member of the support team, including compensation eligibility, salary information, compa ratio, and so on.

## Compensation Components Views

The Compensation Plans list consist of the compensation plans owned by the manager. By selecting a compensation plan, and then clicking on an associated view tab, the manager can view and modify performance and compensation information for each direct report. [Table 10](#) describes the views.

Table 10. Compensation Planning and Performance Ratings Views

View Tab	Description
Performance	Provides ratings distribution information for the compensation plan owner, and for each of the plan owner's direct reports. For more information on adjusting ratings, see <a href="#">Chapter 7, "Working with Ratings Distributions."</a>
Budget	Provides read-only information such as the total budget, the planned compensation, and the remaining budget for each compensation plan component (Merit, Promotion, Variable Pay and Stock).
Merit	Allows base pay increases based on a combination of sustained high performance in the current position, current position in assigned salary range, competitiveness of the organization's compensation plans, and company financial performance. The Merit list provides a list of employees eligible for merit compensation. Detailed compensation information associated the selected employee appears in a subview form. By drilling down on the Last Name link for the direct report, the manager can view the report's compensation history. By drilling down on the Rating link, the manager can see a review summary, view the direct report's objectives, and delegate the review to the to the next-level manager.

Table 10. Compensation Planning and Performance Ratings Views

View Tab	Description
Promotion	<p>Used to reclassify an employee to a job that requires a higher level of skill, competency and responsibility. A promotion must be accompanied by increased job scope, impact, and management responsibility or span of control.</p> <p>Employees are typically promoted to the next level in their career path. A promotion may or may not be accompanied by change in compensation. If compensation is warranted, the amount should place the employee at the minimum of the new salary range, and the amount should not exceed the maximum of the new range.</p>
Variable Pay	Short term, discretionary bonus payment. This compensation may reflect the organization's overall performance and takes into account an employee's annual performance contribution.
Stock	Provides the employee with an opportunity for long-term equity in the organizations, and is awarded to recognize performance and future leadership potential.
Recommendations Status	Lists all compensation plans owned by the manager, and the status of the submitted plan.
Justification	Provides a text field for supporting comments to justify compensation or promotion.

## Selecting the Compensation Plan for Rollout

The manager participating in the compensation plan rollout begins the process by selecting the compensation plan from a Compensation Plans list of owned plans. The manager can select a customized plan from the My Workbook List view or a group-based plan from the Team Workbook List view and see compensation summary information for members of the manager's team in the Team Summary List view.

This task is a step in ["Process of Setting Up Compensation Planning" on page 68](#).

### ***To select the compensation plan***

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link My Workbook List.  
The Team Workbook List appears as the default.
- 3 In the Compensation Plans list, query for the compensation plan.
- 4 In the More Info form, review the compensation plan information.



## Defining Compensation Changes for Direct Reports

If a budget is associated with a compensation plan, and guidelines are established for the compensation component, compensation amounts for eligible employees are automatically populated according to the performance rating.

Managers can make discretionary adjustments to the compensation amounts, and then use the compensation tool to make sure the adjustments meet the established guidelines for the ratings category.

The manager involved with a compensation plan rollout defines compensation changes for each employee, specifying which direct reports receive merit, promotion, variable pay, and stock compensation. For each compensation-specific view, the Roll Up and Roll Down buttons allow the manager to roll up all compensation plans, or roll them down, according to a previously established hierarchy.

This topic is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### Related Topics

- [Compensation Guidelines Indicator on page 90](#)
- [Tracking Compensation Plan Recommendations Status on page 91](#)

### *To define compensation changes for direct reports*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click the appropriate view tab for the type of compensation the employee is receiving.  
Options are Merit, Variable Pay, Promotion, and Stock.
- 5 In the list, query for the employee.
- 6 For each employee, modify the values in the appropriate fields.

The following table describes some of the fields for each view.

View	Fields
Merit	Enter amounts in either the Change % or the Change Amount fields.
Promotion	Specify a new job code, and then enter values in either the Change % or the Change Amount fields.
Variable Pay	Specify the % of Target award to award for the bonus.
Stock	Specify the number of shares awarded for the stock grant.

## Compensation Guidelines Indicator

When a compensation component value is adjusted, the proposed compensation is compared against the guidelines, and if the amount is above or below the recommended amount, an indicator appears in the Guidelines field. The Compa Ratio is also calculated.

Figure 10 shows the Guidelines field for a group of eligible employees within the merit compensation component. In records where compensation exceeds the guidelines, a plus sign appears. If the compensation is below the amount recommended in the guideline, a minus sign appears. If the compensation is within the recommended range, the field appears blank.

New Salary	New Compa Ratio	Guidelines	Roll Status	Manager
\$65,000.00	1.18			HHUNT
\$47,000.00	0.93			PMOORE
\$64,000.00	1.16	In guideline range		MMARKS
\$69,360.00	1.10	⊕		MMARKS
\$75,472.80	1.19		⬆	JRUBIN
\$69,666.00	1.10			HHUNT
\$74,550.00	1.18	⊕	⬆	JRUBIN
\$70,000.00	1.11		⬆	JRUBIN
\$60,320.00	0.95	⊖	⬇	JRUBIN
\$45,500.00	0.82			PMOORE
640,868.80				

Figure 10. Guidelines Indicator and New Compa Ratio Fields

For example, if guidelines stipulate that for the individual, the merit increase should be between 4 and 8 percent, and the increase that is entered is 3.5, the guideline indicator (a minus sign) alerts the manager that the proposed merit increase is below the recommended target range for a rating of 1.1, and a compa ratio of 1. If the planned increase is 15%, the system signals that the proposed amount is outside the range of the amount established for the individual's peers.

Individuals that are significantly underpaid typically have a compa ratio of less than 1. If you sort employees that have the same job role by salary, the mid-range employee typically will have a compa ratio of 1. Having a compa ratio below 1 may also mean that the individual was just promoted to the job role.

## Adding Justification Comments to the Compensation Plan

Managers can add comments about the Compensation Plan and participants using the Justification view. The comments are visible to any individual accessing the compensation plan.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

#### Related Topic

[Defining Compensation Changes for Direct Reports on page 89](#)

#### *To add justification comments to the compensation plan*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click the Justification view tab, and add comments in the text field.

## Tracking Compensation Plan Recommendations Status

Managers can see the status of compensation plan recommendations in the Recommendations Status view, which is automatically updated as compensation plans are reviewed and submitted or rejected. Each time the compensation plan status changes, Recommendations Status is updated with a new record.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

#### *To review the status of a compensation plan*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click the Recommendations Status view tab.

#### Related Topic

[Defining Compensation Changes for Direct Reports on page 89](#)

## Submitting a Compensation Plan for Approval

After compensation changes are completed, the manager submits the compensation plan to the designated approver.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

#### *To submit a compensation plan for approval*

- 1 Navigate to the Compensation Planning screen.

- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan.
- 4 Click Submit.

## Approving and Rejecting a Compensation Plan

The designated approver reviews and either approves or rejects submitted compensation plans. If the compensation plan is approved, then it is automatically submitted for Final Approval.

This task is a step in [“Process of Setting Up Compensation Planning” on page 68](#).

### *To approve and reject compensation plans*

- 1 Navigate to the Compensation Planning screen.
- 2 In the Compensation Plans view, click the link Team Workbook List.
- 3 In the Compensation Plans list, select the compensation plan, and then click the appropriate action button.
  - Click Approve to approve the selected compensation plan. Approved compensation plans are no longer editable.
  - Click Decline to decline approval for the compensation plan. Declined compensation plans are editable by the manager who submitted the plan.

## Assigning Compensation Support Team Members to Employees

In cases when managers cannot perform compensation plan actions, and employees request compensation advice, Human Resources can assign support team members to assist employees. For example, Human Resources can assign a manager-level support team member to a manager who needs administrative support while vacationing, or to a manager who needs to delegate some compensation tasks.

If an employee has a compensation question, the HR-assigned employee-level support member can view the employee's compensation information and make recommendations.

### Manager-Level Support Member

This support team member performs in a proxy capacity, completing necessary tasks such as modifying, submitting, and rejecting compensation plans on the behalf of the manager they are supporting. However, the manager-level support member cannot access the individual employee's compensation details.

## Employee Level Support Member

This support team member can view specific compensation details for the employee to whom they are assigned. The employee-level support member cannot modify employee-level data.

These tasks are a step in [“Process of Setting Up Compensation Planning” on page 68.](#)

### *To assign support for an employee*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees> Support Team.
- 2 In the Employees list, select the employee.
- 3 In the Support Team list click New to add a support team member.
- 4 In the new record, select the Support Rule, and complete the remaining fields.  
Support Rules are either Employee-Level Support or Manager-Level Support.

### *To assign employees to an employee-level support person*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees > Employee Level Support.
- 2 In the Employees list, select the support person (employee) to whom employees are to be assigned.
- 3 In the Employee Level Support list add the employee and complete the fields.  
You can add more than one person for employee level support.

### *To assign employees to a manager-level support person*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees > Manager Level Support.
- 2 In the Employees list, select the support person.
- 3 In the Manager Level Support list, add an employee.  
You can add more than one employee for manager-level support.

### *To assign employees to existing support people (HR task)*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Support Team List.  
Using the Visibility filter, you can list the Support Team - Employee Level, or Support Team - Manager Level individuals. To be listed, at least one employee must be assigned to the Support Team member.
- 2 In the Support Team list, select the support person to whom employees are to be assigned.

- 3 In the Supported Employees list, add one or more employees.

Selected employees are supported by the selected support team member in either a manager-level or an employee-level capacity.

## Exchange Rates for Compensation Planning

When planning compensation that uses multiple currencies, the associated currency exchange rates must be defined and accurately maintained within the Siebel application.

The exchange rates from one currency to another must be defined with reciprocity within currency administration. For example, the exchange rate between U.S. Dollars to Japanese Yen and Japanese Yen to U.S. Dollars must both be defined.

Related Topics:

[Process of Setting Up Compensation Planning on page 68](#)

# 7

## Working with Ratings Distributions

Siebel Ratings Distribution is an extension to the compensation planning tool that further refines the performance management process. With this capability, managers can make sure that they meet the ratings distribution guideline defined by their organization and provide a set of ratings that are consistent across different business units.

This section describes the Ratings Distribution process. It includes the following topics:

- [About Ratings Distributions Adjustments](#)
- [Process of Setting Up and Managing Ratings Distributions](#)
- [Specifying Review Periods for Ratings Distributions](#)
- [Compensation and the Ratings Distribution](#)
- [Performance and Ratings Distribution Timeline](#)
- [Adjusting and Submitting Team Ratings](#)
- [Submitting Plans for Ratings Distribution Approval](#)
- [Ratings Distribution and Plan Approvals](#)

### About Ratings Distributions Adjustments

Large companies often use a rating distribution curve process to prevent inflation of ratings between different managers and business units, and to make sure employees are scored in a consistent and equitable manner across all of the organization's business units.

The ratings curve encourages good management practices by requiring managers to objectively evaluate each employee's performance in relation to peers in similar job functions, and to distinguish individual performance achievers within a team.

The ratings distribution process also may be administered in conjunction with a discretionary organization-wide compensation program that includes budgeted compensation plans for each manager.

The organization can use the ratings distribution process as a tool to determine how proposed merit, bonus and stock distribution recommendations support the organization's total compensation strategy, and how the proposed company-wide compensation package compares to findings within a competitive labor market.

[Table 11](#) shows an example that defines each rating category and its ratings distribution percentage.

Table 11. Sample Rating Definition and Distribution Curve

Rating	Definition	% Employees	Tolerance
4.6-5.0	Substantially and consistently exceeds performance expectations	10%	5%
4.0-4.5	Exceeds performance expectations	25%	5%
3.0-3.9	Successfully meets performance expectations	50%	5%
2.0 - 2.9	Room for improvement. Newly hired or newly promoted employees may fall into this category.	10%	5%
1.0 - 1.9	Does not meet performance expectations	5%	5%

As [Table 11](#) shows, scores of 4 and 5 are used to differentiate those relative few employees who consistently exceed their objectives. A rating in the 3 range, which 50% of employees receive, means that the employees successfully met performance objectives. A score of 2 indicates that the employee must develop some areas of performance to become more successful, or that the employee is new to the job role. A score of 1.0-1.9 is limited to approximately 5% of employees who do not meet performance expectations. In this example, a ratings tolerance of 5 percent is specified for each ratings category. Using Siebel Tools, you can modify these values to build a specific rating distribution guideline for your organization.

The overall curve is typically managed at the senior executive level, with each business unit meeting the distribution guidelines during review periods. Groups with less than 50 employees may not be able to meet the distribution curve. In these cases, distribution targets are typically met at the next management level within the department. Managers with larger groups must attempt to meet the curve requirements to maintain integrity during the roll up of ratings that join the curve at the next business unit level. A typical rollup scenario might include first line managers setting ratings, and submitting the ratings to the next-level manager. The next-level manager modifies and consolidates the ratings into a broader (regional) distribution, and then submits the distribution to an executive level manager, such as a vice president.

As a best practice, managers are advised not to assign a rating that is inconsistent with performance simply to meet a distribution curve. To reinforce this guideline, managers are required to justify the ratings assigned to their direct reports so that the organization's executive staff can make appropriate ratings decisions when managing the curve rollup in a hierarchical manner at the organization level.

The ratings distribution curve process can be administered separately from the compensation process. For example, a company might rate its employees twice a year, and only provide performance-based compensation annually. At the midpoint of the year, managers assign ratings based on the distribution curve in a process that is not tied to a compensation budget. During annual reviews, the ratings for the six-month and 12-month reviews are averaged, and associated with a budgeted compensation plan.



# Process of Setting Up and Managing Ratings Distributions

The following lists show the procedures that administrators and managers typically perform to set up and use Ratings Distributions. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up ratings distributions, perform the following procedures:

- 1 [Defining Compensation Planning Cycles on page 82](#). Create a new planning cycle associated with the review period to be evaluated.
- 2 [Creating a Compensation Budget and Budget Type on page 78](#). If the ratings distribution process is not linked to a compensation budget, create and calculate a placeholder budget in which the budget type or employees are not specified.
- 3 [Associating a Compensation Component with a Planning Cycle on page 83](#). If the planning cycle involves compensation, add the compensation components required for the compensation cycle.
- 4 [Specifying Review Periods for Ratings Distributions on page 97](#). Create a compensation plan and configure the ratings distribution option.

## Manager Procedures

To work with ratings distributions, perform the following procedures

- 1 [Adjusting and Submitting Team Ratings on page 99](#). Managers review the ratings distributions for the team, and adjust the ratings as necessary.
- 2 [Submitting Plans for Ratings Distribution Approval on page 102](#). Managers submit compensation plans for Ratings Distribution Approval.

# Specifying Review Periods for Ratings Distributions

As an administrator, you create a compensation plan and configure the ratings distribution option by specifying the review periods to be included in the ratings adjustments process.

This task is a step in [“Process of Setting Up and Managing Ratings Distributions” on page 97](#).

### *To specify review periods for ratings distributions*

- 1 Navigate to Administration - Compensation Planning.
- 2 Choose Ratings Distribution from the visibility filter list.

- 3 In the list, choose a compensation plan and complete the fields in the form.

The following table describes the fields.

Field	Description
Annual Period	Specifies the annual review year that is being adjusted.
Period 1-4	Specifies the periodic reviews that are displayed in the ratings adjustments view.
Adjusted Period	The actual period that is used to modify the ratings. The adjusted period is displayed in the ratings adjustments view and shows the number of employees in each rating category.
Period edit flag check box	Used to mark a period as being editable by the managers. Periods must have a status of PDA (Pending Distribution Approval) to allow editing.

## Compensation and the Ratings Distribution

When managers submit the reviews, reviews are assigned a status of PDA (Pending Distribution Approval). The status for the performance reviews does not change until the organization finishes the Rating Distribution process.

If employees are compensated for performance and a budget is provided, the ratings are interpreted and suggested compensation amounts are calculated according to compensation plan guidelines. The compensation plan, a budgeted set of merit, bonus, stock, or promotion recommendations covering the manager's team of direct and indirect reports, is rolled down to a first-level manager by the supervisory manager.

The ratings-based compensation amounts for each employee appear in the MyTeam's Compensation list. The view lists each employee's rating, the performance range, a rating guideline indicator for each record, and navigation links to each employee's performance review.

Managers can edit individual employee objectives scores, comments and weights during the rating adjustment process period, but they cannot modify the overall score. Modifying the overall score is performed using the compensation planning tool as part of the ratings adjustment process. The compensation tool flags manager ratings that are higher or lower than the mandated guidelines for the rating distributions.

Managers can also see the latest adjusted rating in Objectives and Reviews while reviews are in PDA status. If a change in the rating occurs, the compensation guidelines for individual employees are automatically recalculated.

After scores and compensation amounts are adjusted, the manager's compensation plan is submitted to the next-level manager for approval.

The Pending Distribution Approval status changes to the Manager to Release status when the compensation cycle is completed. To complete this process, the administrator must release the reviews from within the Administration - Compensation Planning screen's Compensation Plan Rules Administration view (Planning Cycles visibility filter). The compensation plan must be closed by the final approver before the administrator can click the Release Reviews button.

## Performance and Ratings Distribution Timeline

An organization typically uses a timeline similar to the following example during a review period that includes a ratings distribution. This example includes dates for an Q1 review period.

- **Jan. 8.** During a company performance review period, each employee completes a self-review and submits the review by a specified date to the employee's manager.
- **Jan. 19.** The manager approves the employee's self-review, completes the manager's review of the employee and assigns an overall rating to the employee. When the manager submits the review, the review status becomes PDA.
- **Jan. 22.** At the established deadline, the administrator locks the remaining reviews to PDA status, and managers review ratings distribution using the compensation planning application.
- **Jan. 23.** This process continues until the final approver manager reviews and approves the rating distribution.
- **Jan. 23-Feb. 6.** Compensation plans are released, and managers conduct performance review meetings.

## Adjusting and Submitting Team Ratings

From the Compensation Planning screen, a manager can view compensation plan and budget details, and check and adjust the direct report's rating with overall team ratings distribution. [Figure 11](#) shows an example of the Compensation Planning screen, with the Performance view tab exposed.

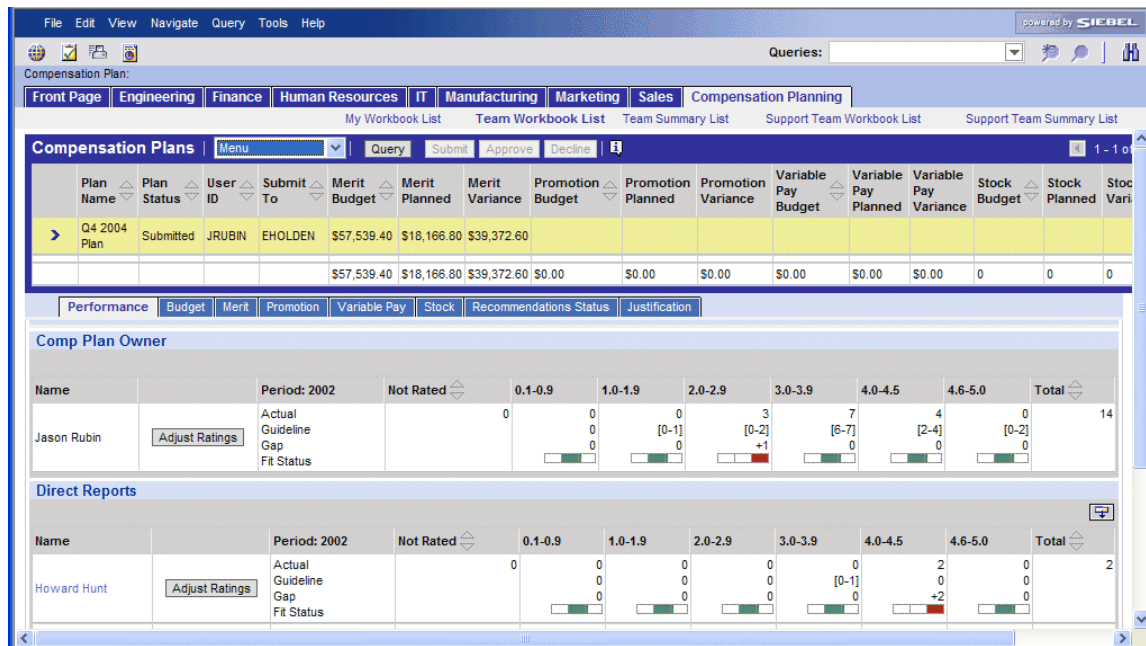


Figure 11. Compensation Planning Screen with Performance View

The owner of the selected compensation plan appears, along with a hierarchical list showing the total number of direct and indirect reports for the manager. For example, as [Figure 11](#) shows, compensation plan owner Jason Rubin has 14 reports, one of whom is Howard Hunt, a manager with two reports. The selected compensation plan identifies the next manager in the approval process for the submitted compensation plan, in this case, Ed Holden.

For each manager reporting to Rubin, the record shows the total number of employees reporting to that manager, as well as the number of employees in each ratings range (Actual). The Guideline value is expressed as the number of employees that must be in the ratings range to be in compliance.

Each rating range is calculated by adding and subtracting a tolerance value from the expected number of employees in the range. The rating ranges, guidelines and tolerances are configurable using Siebel Tools. Tolerances are usually unique for each range.

For example, an organization has determined that 50 percent of its employees should be in the 3.0-3.9 range, with a tolerance of 2%. If a manager has a total of 53 employees, 26.5 employees should be in the 3.0-3.9 range. If the tolerance value for the range is 1.5, subtracting that number from 26.5 sets the low end of the range at 25. Adding 1.5 to 26.5 establishes the high end of the range at 28. Consequently, between 25 and 28 of the manager's direct reports should be rated in the 3.0-3.9 range.

The Gap value is the difference between the guideline and the actual number of employees actually in the rating category. The gap is displayed numerically (plus or minus), and the Fit Status is expressed as a color-coded indicator that flags ratings that are over or under the guideline for the ratings category. For example, as [Figure 11](#) shows, Jason Rubin has rated three reports so that they appear in the 2.0-2.9 ratings category, and the guideline specifies 0-2 employees. The ratings category is flagged as being out of guideline, and a +1 appears, indicating the category contains an extra employee. To maintain the integrity of the ratings curve, Rubin must adjust the rating for one employee so that the employee's score falls into a ratings category that can accommodate another employee.

These tasks are a step in [“Process of Setting Up and Managing Ratings Distributions”](#) on page 97.

### ***To adjust the curve fit ratings of direct reports and submit the compensation plan***

- 1 Navigate to the Compensation Planning screen > Team Workbook List view.
- 2 In the Compensation Plans list, select the compensation plan, and click the Performance view tab.
- 3 Review the ratings distribution for each direct report to identify variances in the distribution curve.

If the direct report is a manager with direct or indirect reports, an Adjust Ratings button appears adjacent to the employee's name.

- 4 Click Adjust Ratings.
- A list of all direct reports appears. The ratings field is editable for each employees that is included in a ratings category that is out of line with the curve-fit guideline.
- 5 In the employee record, click in the Review Report field to see the review components and overall ratings for the employee.
  - 6 In the Rating field, enter a new rating for the out-of-range employee, and save the change.

This action shift the employee from a flagged ratings category to the category that includes the range for the new rating.

**NOTE:** Managers can only edit the ratings of employees who have submitted their compensation plans to the manager. If a direct report has not submitted a plan, the manager can use the roll up functionality for that employee to control the compensation plan and edit the ratings. If the review status is not PDA, the scores cannot be edited. An employee who is on leave of absence might fall into this category.

### ***To roll up a direct report's compensation plan***

- 1 Navigate to the Compensation Planning screen > Team Workbook List view.
  - 2 In the Compensation Plans list, select the plan, and then click the applicable compensation component view.
- For example, click the Merit view tab.
- 3 From the compensation component list, click Roll Up or Roll Up All.

## Submitting Plans for Ratings Distribution Approval

When the ratings adjustment process is complete, the manager submits a compensation plan with the manager's team's ratings to the next-level manager for rating distribution approval. The manager must have received all compensation plans from his direct reports before the manager can submit the compensation plan to the next-level manager.

If a first-level manager's plan has not been submitted for approval, the second-level manager can use the Roll Up and Roll Up All buttons to take ownership of those compensation plans and complete the curve fit process for the first level manager's direct reports. This is typically done when a manager is unavailable to complete the ratings process.

After submission, the reviews and rating distribution cannot be edited by the submitting manager, but are now owned by the next-level manager. The submitting manager can, however, edit and add comments, even when the status is Pending Distribution Approval. The first-level manager can also see changes to ratings for his direct reports made by the next-level manager using the compensation planning tool.

This task is a step in ["Process of Setting Up and Managing Ratings Distributions"](#) on page 97.

### ***To submit a compensation plan for approval***

- 1 Navigate to the Compensation Planning screen > Team Workbook List view.
- 2 In the Compensation Plans list, select the compensation plan, and click Submit.

The plan is automatically routed to the user identified in the Submit To field.

## Ratings Distribution and Plan Approvals

When the upper-level manager navigates to the Compensation Planning screen, the manager sees a list of compensation plans that have been submitted by direct reports, as well as the upper-level manager's own plan. The Budget view shows the budgeted amount, the planned compensation and the variance for each compensation component (Merit, Promotion, Variable Pay and Stock) within the selected compensation plan.

From the Compensation Plans list, the Approve, Decline and Submit buttons are active, according to the state model. If the next step is to submit a compensation plan to the next level of management for approval, the Submit button is active, and the Approve and Decline buttons are inactive. If the next step is to approve or decline a compensation budget submitted by a reporting manager, Approve and Decline buttons are active, and the Submit button is inactive.

The supervisory manager clicks the Performance view tab to check the ratings curve fit for the submitting manager's direct reports. If a normal ratings distribution is in place, the distribution of compensation falls within the budgeted amount of compensation, and compensation plan can be approved. After a compensation plan is approved, it is no longer editable.

If the curve fit is out of line with the organizations ratings distribution curve, the upper-level manager can take the following actions:

**Decline the compensation plan.** Ownership reverts to the submitting manager who adjusts the ratings for his or her direct reports, and then resubmits the revised compensation plan to the approving manager.

**Modify the ratings to fit the curve.** Because the upper-level manager owns the compensation plan submitted by a subordinate manager, the upper-level manager can opt to adjust the ratings for the first-level manager's team, as necessary, using the rollup functionality.





# 8

## Setting Up Competency Management

Siebel Competency Management is an ERM module that is used by managers to associate skills with job profiles, by Training Administrators to associate specific skills with training objectives, and by employees to associate skills with their employee profile.

This chapter describes setting up and managing competencies. It includes the following topics:

- [Assessment of Skills and Achievements for Competency Management on page 105](#)
- [Scenario for Competency Management on page 107](#)
- [Process of Setting Up Competency Management on page 108](#)
- [Creating Competency Categories on page 108](#)
- [Creating and Modifying a Skill on page 109](#)
- [Creating Job Profiles on page 110](#)
- [Associating Competencies with a Job Profile on page 112](#)
- [Creating Career Path Options for a Job Profile on page 112](#)
- [Syncing Required Skills for Employee Competency on page 113](#)

### Assessment of Skills and Achievements for Competency Management

Your Siebel application saves employee information within groups of records. Combined, these records make up an employee profile.

An employee profile includes information that identifies an employee, lists the employee's proficiencies and experience, and provides information on the employee's qualifications, honors, rewards, and past education.

Also included in an employee profile are sets of skills and abilities that are associated with an employee. These sets of abilities, called *competencies*, are used within Competency Management System to help measure the abilities and achievements of employees. Competencies might be employed in the following ways:

- **Training and Development.** Skills and competencies are associated with courses and classes offered through the Siebel Training application. When employees successfully complete a course, their profiles are automatically updated with the skills associated with the course.

- **Career Management.** The Career Management feature allows employees to view their job profiles, browse potential career paths, and define their next career step. The skills associated with an employee's profile are compared to the skills associated with jobs in the employee's career path. The Competency Management feature calculates the skills gaps that exist between an employee and other job profiles. The skill gap analysis indicates skill deficiencies and provides employees with indications of which skills they need to acquire. Employees can also review the recommended courses they can enroll to close those gaps.
- **Team Competency Planning.** Using Siebel Competency Management, managers can direct the acquisition of competencies and skills within their groups. Managers can analyze their team's current skill set, the required skill set based on the employee's job profile, and can view individual competency profiles of team members. The skill gap analysis of a team's current strengths and weaknesses allows managers to provide training suggestions or define future hiring requirements. Managers can set competency objectives and monitor each employee's progression towards these goals.
- **Performance Management.** Competencies can be included in the formal performance management process. Employees can include specific competencies in their performance setting process and managers can review and access these ratings as part of the overall assessment process.

#### **Related Topics**

[Competencies, Categories and the Skills Hierarchy on page 106](#)

[Scenario for Competency Management on page 107](#)

[Process of Setting Up Competency Management on page 108](#)

## **Competencies, Categories and the Skills Hierarchy**

Using Competency Management, you can develop multilevel hierarchies of categories and skills relevant to your organization's industry. You build a hierarchy by associating skills with categories through parent-child relationships. Defining skills involves setting up the necessary categories.

As illustrated in [Figure 12](#), the Competency Administration screen provides a Skills Hierarchy on the left, which is represented by a folder. Expanded below the folder are several skills categories, which are represented by file icons. The skills categories include other categories and skills. The right section of the screen includes the Category/Skill list, which shows records based on the selection in the Skills Hierarchy. Below the Category/Skill list is the Child Items list, which includes the records associated with the child records.

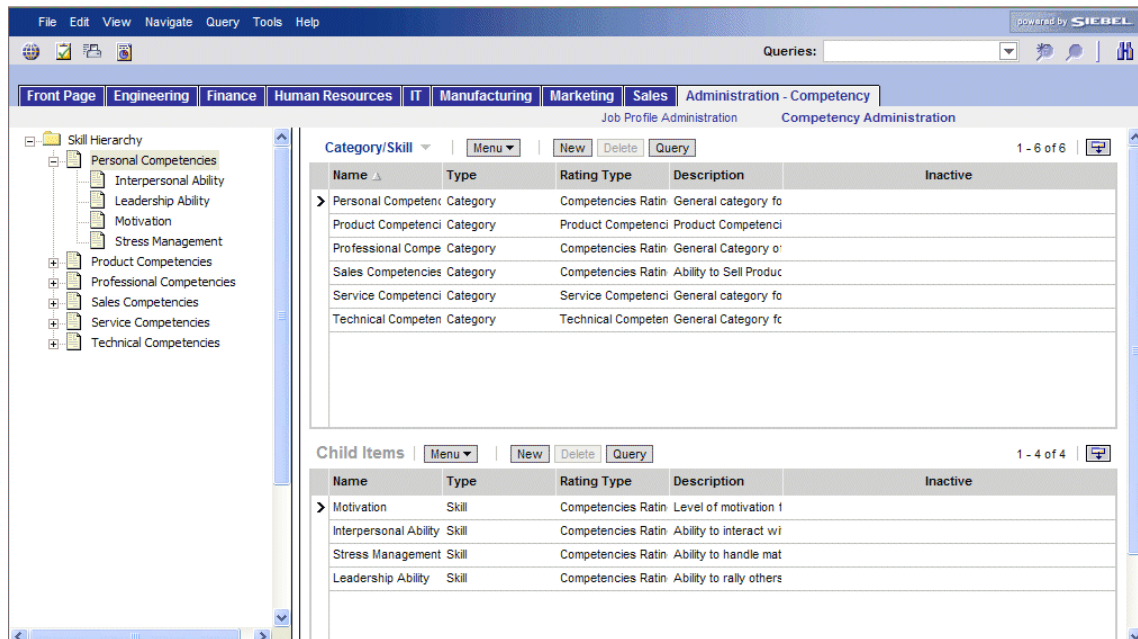


Figure 12. Competency Management Hierarchy

### Related Topics

[Assessment of Skills and Achievements for Competency Management on page 105](#)

[Scenario for Competency Management on page 107](#)

[Process of Setting Up Competency Management on page 108](#)

## Scenario for Competency Management

This scenario provides an example of a process performed by an administrator and an HR manager. Your company may follow a different process according to its business requirements.

### Administrator

An administrator at a software company is in charge of setting up and maintaining the organization's competency management system. The administrator's organization is developing a new product line with three new management positions to manage the new product. The executive team outlines the skills and requirements for each position and delivers the requirements to the administrator.

The administrator reviews the preconfigured set of more than 1,000 skills in the Skills Library, and then creates some additional skills and categories required by the organization. Following guidelines developed by the organization, the administrator defines a hierarchy of skills, providing a top-down approach from very generic skills to very specific and detailed skills.

The administrator then creates job profiles, which characterize all available job positions within the software organization. The manager links the job profiles together, and associates competencies to the job profiles to establish a career development plan that can be used by the organization to structure the personal career development of each employee.

## Manager

A new employee is hired into one of the new management positions. The Human Resources manager updates the employee's competency profile using the information gathered from the employee's application, resume, and notes from her interview. Either the manager or the administrator synchronizes the required competencies of the new position with the competency profile of the new hire.

# Process of Setting Up Competency Management

The following section describes a process an administrator might follow to set up competency management. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up competency management, perform the following procedures:

- 1 [Creating Competency Categories on page 108](#). Set up categories to logically group related skills.
- 2 [Creating and Modifying a Skill on page 109](#). Create new skills and edit existing skills to meet requirements.
- 3 [Creating Job Profiles on page 110](#). Define job profiles that outline the purpose, responsibilities, and requirements of a specific job.
- 4 [Associating Competencies with a Job Profile on page 112](#). Associate the job profile with the specific skills required for that job.
- 5 [Creating Career Path Options for a Job Profile on page 112](#). Link job profiles to create career paths.
- 6 [Syncing Required Skills for Employee Competency on page 113](#). Transfer required skills to an employee.

## Creating Competency Categories

The Competency Administration Category list is used to classify skills. Related skills are grouped logically, using categories and subcategories. Categories define the structure through which skills are ordered.

This task is a step in [“Process of Setting Up Competency Management” on page 108](#).

### ***To create a new category***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Competency > Competency Administration.
- 2 In the Skill Hierarchy explorer, select a parent category.
- 3 In the Category/Skill list, add a new record, and then complete the fields.

The following table describes the fields in the category/skill record.

Field	Comments
Name	The name of the category.
Type	Indicate the type of record you are creating (Category or Skill).
Rating Type	The appropriate rating scale. For more information, see <a href="#">“Defining a Rating Scale with Rating Values” on page 46</a> .
Description	A description of the category.
Inactive	A check mark indicates that a category or skill is inactive. Inactivating or activating a root category does not affect the subcategories and skills within the category.

### ***To create a child category***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Competency > Competency Administration.
- 2 In the Skill Hierarchy explorer, select a parent category.
- 3 In the child items list add a new record, and then complete the fields.

## **Creating and Modifying a Skill**

A skill is a consistent demonstrated level of proficiency in an area of expertise that an employee possesses or wants to achieve. For example, Oracle DBA, Presentation Skills, Leadership Ability, and Siebel ERM Administration are valid skills that an employee can attain. Some skills are subjective and are based more on the judgment or discretion of a manager. Other skills are objective and are based on an employee's successful completion of specific goals. Administrators can create and edit the skills that are used for competency management, and deactivate skills that are no longer needed.

**NOTE:** You cannot create a skill using the name of an existing skill. Skill names must be unique within your Siebel application.

This task is a step in [“Process of Setting Up Competency Management” on page 108](#).

### ***To create a skill***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Competency > Competency Administration.
- 2 In the Skill Hierarchy explorer, select a parent category.
- 3 In the Category/Skills Child list, add a record, and then complete the fields.
- 4 In the new record, select Skill in the Type field.

After the appropriate categories and skills have been created, you can assign specific skills to employees. You can also associate specific skills with training.

### ***To edit a skill or category***

- 1 From the application-level menu choose Navigate > Site Map > Administration - Competency > Competency Administration.
- 2 In the Skill Hierarchy explorer, navigate to the category or skill, and then modify the fields in the record as needed.

## **Removing a Skill**

For data integrity reasons, categories and skills cannot be deleted from the system. However, you can set a flag to inactivate categories and skills, so that they cannot be accessed by employees.

### ***To set the inactive flag for a category or skill***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Competency > Competency Administration.
- 2 In the Skill Hierarchy explorer, select a category or skill.
- 3 In the Category/Skill list, select the record and click the Inactive check box.

## **Creating Job Profiles**

A *job profile* is a collection of job-related information that defines the purpose, responsibilities, and requirements of a specific job role. In the process of defining a job profile, you specify the required competencies by associating skills from the competency library with a job profile. These required competencies allow managers to determine whether employees meet the required skill levels for specific jobs.

It is important to associate the appropriate skills and minimum skill levels with job profiles so that employees, managers, and administrators can integrate skills analysis and management across the entire work force.

Job profiles can be imported to Siebel ERM using eAI. For more information about importing job profile information using eAI, see *Overview: Siebel eBusiness Application Integration Volume I*. Job profiles can also be created in Siebel ERM using the Administration screens.

To create a job profile, the relevant job code, job family, salary grade, EEO Category, and FLSA must already exist. For more information, see [Chapter 6, “Setting Up Compensation Planning.”](#)

This task is a step in [“Process of Setting Up Competency Management” on page 108.](#)

### ***To create a job profile***

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Competency > Job Profile Administration**. Before you create a new job profile, make sure the job profile you want to create does not already exist. Query the Job Profile list using the name of the job profile you want to create. If no records are returned, create the new job profile.
- 2 In the Job Profile list, add a new record, and then complete the fields in the More Info form.

The following table describes some of the preconfigured fields. Your Human Resources organization may want to track different fields; those fields should be configured when the application is deployed.

Field	Comments
Job Profile Name	The name of the job profile.
Main Purpose	The job designation.
Essential Functions	A brief description of job duties and functions.
Job Code	The job code associated with the job profile. The Job Code Name and the Job Family fields are automatically populated based on the job code.
Role	Defines the function associated with the job. For example: individual contributor, manager or manager of managers.
Years of Relevant Experience	The employees relevant experience. This value is provided by Human Resources.
Degree of Internal Contact	Estimated time the employee spends interacting with company employees.
Revenue Responsibilities	The revenue for which the employee is responsible.
Travel	An estimate of time spent away from the home office.
Degree of External Contact	Estimated time the employee spends interacting with individuals outside the company. This includes customers, but may also include other vendors or suppliers. For example, the degree of external contact for a purchasing manager is high.
Operational Budget	The budgeted amount that allows the employee to fulfill job requirements.
Geographic Scope	The geographic area that the employee must manage. For example, a sales manager might be responsible for the southeast region of the country.
Office Equipment/Tools	The tools that the employee requires to perform the job.

Field	Comments
Degree of Customer Contact	The amount of time the employee spends with customers.
Total Number of Reports	The total number of reports.

## Associating Competencies with a Job Profile

After the appropriate job profiles are created, you can associate the competencies with each profile. A job profile can be associated with multiple competencies. A competency can also be associated with multiple job profiles.

This task is a step in [“Process of Setting Up Competency Management” on page 108.](#)

### *To add a competency to a job profile*

- 1 From the application-level menu, choose [Navigate > Site Map > Administration - Competency > Job Profile Administration > Required Competencies](#).
- 2 In the Job Profiles list, query for a job profile, and then click the Required Competencies view tab.
- 3 In the Required Competencies list, add a new record.
- 4 In the new record, click the select button in the Name field.
- 5 In the Skills list, query for the skill you want to associate with the job profile, and then click OK.
- 6 In the Required Level field, select the skill level required for the job profile. For example, if you are associating a product knowledge competency with a Receptionist job profile, you can require a lower level than you would if you were setting up the Customer Support Specialist job profile.
- 7 In the Criticality field, select a rating that indicates the importance of the selected skill for the job profile.

## Creating Career Path Options for a Job Profile

After the appropriate job profiles are created, you can associate them with other job profiles to create career paths. A career path is a hierarchy of job profiles. These associations represent a career path for employees. After several job profiles are associated with one another, employees and managers can use the Career Planning feature to navigate through the hierarchy and determine a career path.

This task is a step in [“Process of Setting Up Competency Management” on page 108.](#)

### *To create a career path option*

- 1 From the application-level menu, choose [Navigate > Site Map > Administration - Competency > Job Profile Administration > Career Path Options](#).



- 2 In the Job Profiles list, select the job profile, and then click the Career Path Options view tab.
- 3 In the Career Path Options list, add a new record.
- 4 In the new record, click the select button in the Name field.
- 5 In the Job Profiles list, query to find the job profile you want to designate within the career path, and then click OK.

The primary flag indicates the next career option for currently selected job profile.

## Syncing Required Skills for Employee Competency

After the job profiles are defined in the system, a synchronization process is required to copy the skills associated with a specific job profile to the personal skill inventory of that employee. Managers and employees can then target skill gaps. When an employee begins a new job, a synchronization is required to populate the employee's personal job profile with the required skills. After the skills are synchronized with the profile, the required levels of proficiency for the job appear, with the Current status uncompleted (blank).

Employees can perform a skills self-assessment to increase their competency level. Competencies can also be evaluated by managers as part of the performance management process, and competencies are updated when the employee takes training.

If the employee changes jobs, the employee is assigned a new job profile and another synchronization is performed by the administrator or manager to obtain the new set of skills required for the job. The previous set of skills that the employees achieved remains in the employee's skill profile. Employees can add additional skills to the profile, using the skills approval process.

This task is a step in ["Process of Setting Up Competency Management" on page 108](#).

### ***To synchronize required skills with a job profile***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User.
- 2 In the Employees list, query for the employee, and then click the link in the Last Name field.
- 3 From the Employee form, click the Competency view tab.
- 4 In the Competency list, click Sync Required Skills.



# 9

## Managing Group News

Using Group News, an organization's news authors and content managers can create, edit, approve, preview, and publish real-time news content within the Siebel application.

This chapter describes the how to set up and manage Group News authoring. It includes the following topics:

- [Scenario for Group News on page 115](#)
- [Process of Managing Group News on page 116](#)
- [Setting Up News Administrators, Authors, and Approvers on page 117](#)
- [Setting Up the Group News Approver Workflow on page 118](#)
- [Creating a Content Path on page 119](#)
- [Creating Stages for a Group News Content Path on page 120](#)
- [Designating Group News Approvers on page 121](#)
- [Setting Up Access to Group News on page 121](#)
- [Managing Versions and Publishing from the All News Stories List on page 122](#)
- [Creating a News Story \(End User\) on page 122](#)
- [Previewing a News Story \(End User\) on page 126](#)
- [Submitting a News Story for Approval \(End User\) on page 126](#)
- [Approving a News Story \(End User\) on page 126](#)

### Scenario for Group News

This scenario provides an example of a process performed by the Group News administrator, content manager, and approver. Your company may follow a different process according to its business requirements.

#### Administrator

The top executive at an organization decides that important company news stories should originate in the Top Story section on the company's Home Page and then move to the Feature Articles section on day two and the Archive section on day three.

This business requirement is communicated to the Group News administrator responsible for creating content paths. As part of the content path creation process, the news administrator designates authors and approvers through responsibilities, determines the approver workflow, the set of approvers, and the employee access groups that have visibility rights to the news story.

After the content paths are created, the news administrator defines three stages, one for each of the sections in which a news story associated with this content path is published—Top Story, Feature Articles, and News Archive.

### Content Manager

An Alliances Content Manager has been asked to write a news story describing an important new partnership. To publish a news story, the content manager creates the news story record and selects a content path. The author then creates the news story content, previews the content, and submits the story for approval. On the Go-Live date, the story appears in the Top Story section on the Alliance Microsite and then in the Feature Articles section on the Sales Microsite.

### Approver

The Vice President of Alliances is the first approver in the Alliances content path selected by the content manager. After the manager submits the news story, the Vice President of Alliances receives it in her inbox. The approver reviews the news story, makes edits as appropriate (edits and comments are automatically cataloged in Version Control) and submits it for the second approver's review. If the second approver approves the story and the go-live date associated with the news article has passed, the story is immediately published and visible to employees.

### Employee

An employee visits the Sales Microsite. The employee sees only those articles that are approved and for which the employee has been given visibility rights. In the Top Story section, the employee clicks on the link to the full story and reads the latest news about the new partnership.

## Process of Managing Group News

The following list shows the procedures that administrators and employees typically perform to set up and use Group News. Your company may follow a different process according to its business requirements.

### Administrator Procedures

To set up Group News, perform the following procedures:

- 1 [Setting Up News Administrators, Authors, and Approvers on page 117](#)
- 2 [Setting Up the Group News Approver Workflow on page 118](#)
- 3 [Creating a Content Path on page 119](#)
- 4 [Creating Stages for a Group News Content Path on page 120](#)
- 5 [Designating Group News Approvers on page 121](#)
- 6 [Setting Up Access to Group News on page 121](#)
- 7 [Managing Versions and Publishing from the All News Stories List on page 122](#)

## End-User Procedures

To use group news, perform the following procedures:

- 1 [Creating a News Story \(End User\) on page 122](#)
- 2 [Previewing a News Story \(End User\) on page 126](#)
- 3 [Submitting a News Story for Approval \(End User\) on page 126](#)
- 4 [Approving a News Story \(End User\) on page 126](#)

## Setting Up News Administrators, Authors, and Approvers

As an administrator, you assign responsibilities to other administrators, content managers and authors, allowing these users to author and approve news stories and access views.

Siebel ERM is preconfigured with several responsibilities specific to Group News, which organizations can use to set up Group News users. [Table 12](#) describes the preconfigured Group News responsibilities.

This task is a step in [Process of Managing Group News on page 116](#).

Table 12. Preconfigured Group News Responsibilities

Responsibility	Comments
ERM Group News Administrator	<p>Users with the Group News Administrator responsibility can access the Group News Administration views and can perform the following procedures:</p> <ul style="list-style-type: none"> <li>■ Create a content path, which includes selecting an approver workflow, defining content stages, assigning approvers, and designating access groups.</li> <li>■ Edit submitted or completed news stories.</li> </ul>
Content Manager	<p>Users with the Content Manager responsibility can access the Group News Authoring views and can author and approve news stories. An ERM Content Manager can approve a specific news story only if the manager is designated as an approver for the content path associated with the news story.</p>
ERM Manager	<p>Users with the ERM Manager or ERM User responsibility can access the News Archive on myPage and departmental portal pages. For more information on portal page access, see <i>Applications Administration Guide</i>.</p>
ERM User	<p>Users with the ERM Manager or ERM User responsibility can access the News Archive on myPage and departmental portal pages. For more information on portal page access, see <i>Applications Administration Guide</i>.</p>

### ***To set up Group News responsibilities***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Application > Responsibility List.
- 2 In the Responsibilities list, select the responsibility.  
**NOTE:** The Views and Users lists at the bottom of the screen list users assigned to the selected responsibility, and the views the user can access. You can add or remove views associated with a responsibility according to your organization's needs, or you can create a new responsibility. For more information on creating and modifying responsibilities, see the *Security Guide for Siebel eBusiness Applications*.
- 3 In the Users list, click New, and query to find the user you want to add.  
The user you add is associated with the Group News responsibility you selected.
- 4 In the Views list, review the list of views that the user can access, and modify as needed.  
For example, you can remove views by selecting the view and clicking delete or designate the views as read-only by selecting the Read-Only check box.

## **Setting Up the Group News Approver Workflow**

You can define routing and approver workflow processes for Group News content. The approver workflow process determines the way the Siebel application handles content associated with the workflow. Siebel Group News is preconfigured with a Group News workflow that has two approval levels. This workflow allows Siebel to automatically send content from the creator, to the first level approver, then to the second level approver, and finally to the appropriate page views for publishing. At each point in the workflow process the content can be modified or approved. Approver workflows streamline the approval process, helping news authors to publish time-sensitive content for immediate employee review.

You can use the preconfigured workflow titled Group News Approver Workflow or you can create a new workflow. For more information about workflow modification and creation, see *Siebel Business Process Designer Administration Guide*.

This task is a step in [Process of Managing Group News on page 116](#).

### ***To set up a Group News workflow***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Business Process > Workflow Processes.
- 2 In the Workflow Processes list, query to find \*Group News\*.
- 3 Select the Group News approver workflow process you want to use.  
For example, Group News Multiple Approver Workflow.

- 4 In the Status field, verify that the workflow is Active.

**NOTE:** To create a workflow with additional levels of approval, copy the existing Group News Approver Workflow and add the additional business processes as needed. For more information about creating and modifying workflows, see *Siebel Business Process Designer Administration Guide*.

## Creating a Content Path

Setting up a Content Path allows news authors to automate many of the processes associated with publishing a news story. Group News administrators create content paths in the Group News Administration views; news authors associate content paths with news stories.

A Content Path defines a set of attributes for the news stories associated with the Content Path. These attributes include:

- Where and when the news story is published (stages)
- The individuals responsible for editing and approving the news story (approvers workflow)
- The business process that automates the approval process (approver workflow)
- The groups of users that have visibility rights to the news story (access groups)
- The format in which the news story is published
- Whether the news story should be archived

This task is a step in [Process of Managing Group News on page 116](#).

### To create a content path

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, add a new record, complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Name	The name of the content path.
Workflow	The appropriate Group news workflow approver process. When selecting the workflow process, make sure its status is Active. If the workflow process is not active, authors cannot select it when creating a news story. For more information, see <i>Siebel Business Process Designer Administration Guide</i> .
Status	The status of a new content path is automatically set to Inactive. Setting the status to Active allows authors to select the content path when they create a story.

Field	Comments
Private	The Private flag is selected by default, restricting the visibility of the Content Path to certain groups. Remove the check mark (flag) from the Private check box if the content can be viewed by all employees.
Description	Description of the content path. Include information on which access groups are receiving the content.

## Creating Stages for a Group News Content Path

A stage determines where and when a news story is published. As an administrator, you can create content paths with multiple stages. Authors can then select a multiple-stage content path to publish a news story in different locations at previously specified times.

This task is a step in [Process of Managing Group News on page 116](#).

### *To create the stages for the content path*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, select the content path record, and then click the Stages view tab.
- 3 In the Stages list, add a new record and complete the fields.

The following table describes the fields in the stage record.

Field	Comment
Description	A brief description of the stage.
End Day	The expiration date for the stage. This date is set in conjunction with the go-live date specified by the author. For example, to remove a news story from the selected stage five days after the go-live date, enter 5.
Page	The Siebel microsite page that displays the content. For more information on microsite management, see <i>Applications Administration Guide</i> .
Section	The section on a page for the content. The Section field shows the available sections in the Siebel application. You should make sure that the section you select is an active section on the selected view.
Start Day	The publication date for the stage. This date is set in conjunction with the go-live date specified by the author. For example, to publish a news story during the selected stage on the go-live date, enter 0.
View	The microsite page view on which the content appears.



## Designating Group News Approvers

The Group News Approver workflow that you create allows you to automatically send content from the creator to the first level approver, and then to the second level approver.

When setting up approvers, make sure that the number of approvers entered in the Approvers list equals the number of approvers required by the selected approver workflow. If you select fewer approvers than required by the approver workflow, the news story is not routed for approvals or published. If you select more approvers than required by the approver workflow, the news story is not routed to all of the approvers.

This task is a step in [Process of Managing Group News on page 116](#).

### *To select the group news approvers*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, select the content path, and then click the Approvers view tab.
- 3 In the Approvers list, add a new record, and then complete the fields.
  - a In the Position field, query for the position associated with the employee designated as an approver.
  - b In the Sequence field, enter a sequence number for the approver.  
The sequence number indicates the order in which approvers approve the news story. The first approver has a sequence number of 1.

Repeat this procedure for each approver level in the selected workflow.

## Setting Up Access to Group News

You can establish which employee groups have visibility rights to the news story using the Content Path screen's Access Groups view tab.

This task is a step in [Process of Managing Group News on page 116](#).

### *To set up access to news*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, query to find the content path you want to modify.
- 3 In the content path record, verify that the Private field check box includes a check mark and in the Status field, select Active from the drop-down list.

A status of Active allows news authors to access the content path.

- 4 Click the Access Groups view tab, and then in the Access Groups list, add a record and complete the fields.

Repeat this step for each access group you want to add.

## Managing Versions and Publishing from the All News Stories List

As an administrator, you can manage the versions of a news story, reviewing the version history, previewing previous versions of a story, and, if desired, restoring a previous version of a news story.

You can also perform one-click publication of a news story from the All News list, moving the story directly from the staging database environment to the production database environment.

This task is a step in [Process of Managing Group News on page 116](#).

### *To publish a story*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > All News.
- 2 In the News Stories list, select the News Story, and click Publish.

### *To view a version history and preview the news story*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > All News.
- 2 In the All News List, select the news story, and then click the Versions view tab.
- 3 In the Versions list, select the version, and then click Preview.

The sequence of versions is listed in the Version # field.

### *To restore a previous version of the news story*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > All News.
- 2 In the All News List, select the news story, and then click the Versions view tab.
- 3 In the Versions list, select the version, and then click Restore.

## Creating a News Story (End User)

The Siebel Group News module allows organizations to publish news stories in one of the following formats:

- **Top Story.** News published to this section appears as a large abstract with a large graphic and a link to the full story.

- **Feature Articles.** News published to this section appears as a small abstract with a small graphic and a link to the full story.
- **Today's Headlines.** News published to this section appears as a link to the full story.
- **My News.** News published to this section appears as an abstract with a small graphic and a link to the full story.
- **News Archive.** News published to this section appears as a small abstract with a small graphic and a link to the full story. In the News Archive form, end users can query for articles based on user-specified search criterion.

Authors can publish news in the Top Story, Feature Articles and Today's Headlines sections on the Home Page or on any of the microsite pages. The My News and News Archive sections are located on the myPage.

This task is a step in [Process of Managing Group News on page 116](#).

### Related Topics

[Creating Content for a News Story on page 124](#)

[Importing a News Story on page 125](#)

### *To create a news story*

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 From the News Stories list, click the More Info view tab, and in the ERM Group News Item form click New.
- 3 In the new record, complete the fields.

The sections in the Information form are numbered according to the logical task flow. For example, in Section 1, the author defines the headline and byline for the new story.

The following table describes the fields in the Information form.

Field	Comments
Approver Name	The approver field is automatically populated when there is an approver specified by the content path. The user sees the current pending approver.
Author	The name of the author. This field defaults to the current user and is not visible to news story readers.
By-Line	The byline for the story, as it appears to readers.
Content Path	The content path associated with the news story.
Content Type	The priority of the news story. The content type can be used internally to help categorize news stories by priority level. The content type does not affect the appearance of the news story to readers.
Department	The department of the author or news story.

Field	Comments
Go-Live Date	The date on which the content is activated. This field defaults to the current date and time. The value in this field is also used in combination with the content path Start Day and End Day values to further define the period that content becomes active.
Headline	The headline for the news story, as it appears to readers.
Name	The name for the news story. The name is not visible to readers.
Region	The region of the author or news story.

## Creating Content for a News Story

After the news story is created, authors can enter and edit content for the story, or import content that was previously created in an external HTML editor.

This task is a step in [Process of Managing Group News on page 116](#).

### ***To create the news story content***

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select a news story, and then click the Content Editing view tab.
- 3 In the Content Editing form, enter the news story content, and set the status.

When you click in the Content Editor field, the integrated HTML editor toolbar appears at the bottom of the field. The toolbar provides special editing controls, which allow you to use supported HTML formatting and standard editing features. For more information, see *Fundamentals*.

- 4 Complete the remaining fields as needed.

Depending on the content path selected for the news story, some fields may not be required. A Top Story, for example, uses the Long Abstract and Large Image fields. Feature Articles and My News stories use the Small Image and Short Abstract fields. Today's Headlines stories do not use the abstract or image fields.

The following table describes some of the fields.

Field	Comments
Large Image	A large image for news stories that are published in the Top Story section.
Long Abstract	A long abstract for news stories that are published in the Top Story section.
Short Abstract	A short abstract for news stories that are published in the Feature Articles or My News sections.
Small Image	A small image for news stories that are published in the Feature Articles or My News sections.

**Related Topic**

[Creating a News Story \(End User\) on page 122](#)

## Importing a News Story

Authors and approvers can import news stories and associated graphics at the same time, and then modify the content using the Content Editor.

You can use the Insert File and the Insert Image tools to insert files (such as HTML files, MS Word files, and Adobe Acrobat) and graphics files from your local file system, from shared networks and from the Web. For more information, see the Microsite Management topics in *Applications Administration Guide*.

This task is a step in [Process of Managing Group News on page 116](#).

### ***To import a news story***

- 1** From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2** In the ERM Group News Item form (Information view tab), click New, and complete the fields.
- 3** Click the Content Editing view tab, and then in the Content Editing form, click Import Article.
- 4** In the Pick Content dialog box, click New.
- 5** In the Insert Content dialog box, complete the fields.

Click Advanced to see more fields.

The following table describes some of the fields in the Insert Content dialog box.

Field	Comments
Comments	Type additional comments to describe the content.
Content Type	Specify the type of content you are adding. A list of available types appears when you click the select button.
Filename	Browse to the content you want to import.
Lock	A check mark in this field indicates that the content cannot be edited.
Name	Specify the name to use to be saved in Siebel Content Base.
Title	Specify the title to be saved in Siebel Content Base.
URL	Specify the URL that references the content you are importing.

- 6** Click OK in the Insert Content dialog box, and then click OK again from the Pick Content dialog box.

#### Related Topics

[Creating Content for a News Story on page 124](#)

[Creating a News Story \(End User\) on page 122](#)

## Previewing a News Story (End User)

To view the news story before routing it for approval, use the Preview view tab in the Group News Authoring screen.

This task is a step in [Process of Managing Group News on page 116](#).

#### *To preview the news story*

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select the news story, and then click the Preview view tab to show the news story.
- 3 In the Preview view, click the news story headline link to view the content.

## Submitting a News Story for Approval (End User)

After a news story is complete, the news author submits it for approval. The news story immediately appears in the first approver's News Inbox according to the approver workflow associated with the news story.

This task is a step in [Process of Managing Group News on page 116](#).

#### *To submit a news story for approval*

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select the news story you want to submit, and then click the Content Editing view tab.
- 3 In the Content form, change the value in the Status field to Submitted.

## Approving a News Story (End User)

News approvers must have the Content Manager responsibility. Approvers access news stories that require their approval by navigating to their news inboxes in the Group News Authoring screen.

This task is a step in [Process of Managing Group News on page 116](#).

***To approve a news story***

- 1** From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2** In the News Stories list, select the news story you want to approve.
- 3** Click the Content Editing view tab, and change the value in the Status field to Completed.





# 10 Setting Up Content Services

Siebel Content Services is a news and company information subscription service that is already integrated with Siebel ERM.

Siebel Content Services presents personalized external news about selected accounts, competitors, industries, and customizable subscription topics that are most relevant to your business and each individual employee's job. Business news and company profiles are integrated, filtered, and presented in context for each employee and combined with relevant company internal data drawn from the Siebel customer database. Using a process that maps businesses directly to news sources, Content Services provides only the relevant news topics for businesses, such as your customers, competitors, prospects, and partners.

This chapter describes the administration procedures necessary to add industry news content to a Siebel application. It includes the following topics:

- [Scenario for Content Services on page 129](#)
- [Process of Setting Up Content Services on page 130](#)
- [Assignment of News Topic Administrator Responsibilities on page 131](#)
- [Creation of Access Groups for Content News Services on page 131](#)
- [Setting Up Content Services Host and Authentication Credentials on page 132](#)
- [Creating a News Package on page 133](#)
- [Management of News Topics on page 134](#)
- [Retrieving Account and Competitor News for Briefings on page 136](#)
- [Associating Accounts and Competitors with News Topics on page 137](#)
- [Associating Your Company with a News Topic on page 138](#)
- [D & B Account Rationalization Services and News Topics on page 139](#)
- [Viewing a Tracking Profile Summary for News \(End User\) on page 139](#)
- [Creating a User-Defined News Topic \(End User\) on page 140](#)
- [Previewing a News Topic \(End User\) on page 141](#)
- [Resolving Problems with Content Services on page 141](#)

## Scenario for Content Services

This scenario provides an example of a process typically performed by an administrator, a topic manager, and end users. Your company may follow a different process according to its business requirements.

## Administrator

A financial organization using Siebel ERM has signed a contract with a new client, Acme Software. The representatives in client services, who are responsible for supporting the new client, send a request to the news topic manager to create a news topic for the client.

Because Acme is a computer software company, the administrator creates the news topic within the High Technology news package. The administrator also creates a new access group and assigns the appropriate client service representatives to the group.

## End User

After the account topic is created, the client service representatives modify their tracking profiles to include the newly created news topic.

# Process of Setting Up Content Services

This section lists procedures typically performed by administrators and end users to set up and use Content Services. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up content services, perform the following procedures:

- 1 [Assignment of News Topic Administrator Responsibilities on page 131](#)
- 2 [Creation of Access Groups for Content News Services on page 131](#)
- 3 [Setting Up Content Services Host and Authentication Credentials on page 132](#)
- 4 [Creating a News Package on page 133](#)
- 5 [Management of News Topics on page 134](#)
- 6 [Retrieving Account and Competitor News for Briefings on page 136](#)
- 7 [Associating Accounts and Competitors with News Topics on page 137](#)
- 8 [Associating Your Company with a News Topic on page 138](#)
- 9 [Resolving Problems with Content Services on page 141](#)

## End-User Procedures

To use content services, perform the following procedures:

- 1 [Viewing a Tracking Profile Summary for News \(End User\) on page 139](#)
- 2 [Creating a User-Defined News Topic \(End User\) on page 140](#)

# Assignment of News Topic Administrator Responsibilities

Before a topic manager can administer the user- or administrator-defined content in Siebel Content Services, the employee must be associated with the appropriate responsibilities. You can assign employees additional responsibilities that allow the employees to administer news topics.

To set up a news topic administrator, create a responsibility that provides access to the News Topics Manager screen, and associate it with the appropriate employee. For more information on creating employee responsibilities, see *Security Guide for Siebel eBusiness Applications* and *Applications Administration Guide*.

## Related Topic

[Process of Setting Up Content Services on page 130](#)

# Creation of Access Groups for Content News Services

Before you configure or create a news topic, consider which groups within your organization should have access to news services provided by Content Services. For example, if your organization has purchased seats of Content Services for a subset of employees, only those employees should have access to the external content.

In addition, depending on the employee's role in an organization or the types of clients with which the employee works, an employee may need access to certain industry sources and content topics. Rather than configure topics within Content Services so that the topics are visible to any user, you can configure content so that it is visible to specific groups of users.

You must associate an access group with a news package when you set up the package. As a result, you should create the appropriate access groups for your topics before you set up Content Services.

You should complete the following general procedures before setting up Content Services:

- 1 Make a list of each organization requesting access to each news package (for example, specific industry sources and content topics).
- 2 Create an access group for each news package, unless an appropriate group already exists.
- 3 Associate employees with the access groups used for Content Services.

**NOTE:** When setting up a news package, use these access groups to target the package to a specific group of users.

For more information about setting up access groups, see *Security Guide for Siebel eBusiness Applications*.

## Related Topic

[Process of Setting Up Content Services on page 130](#)

## Setting Up Content Services Host and Authentication Credentials

During Siebel Server installation, the administrator installing the application is asked to specify if the organization has purchased Siebel ERM, Siebel ERM and Siebel Content Services, or neither. When you select Siebel ERM or Siebel ERM and Siebel Content Services, you are asked to enter the assigned content host name, user name, and password that allows you to access the Siebel application-hosted data. Siebel application-hosted data consists of company profiles, corporation relationship information, premium external news feeds, and productivity content from leading content producers and providers. You can also edit these parameters within the application using the following procedures.

**NOTE:** The host name, user name, and password credentials are provided in the license key letter distributed to each customer after purchase.

This task is a step in [Process of Setting Up Content Services on page 130](#).

### *To set up Content Services host and authentication credentials*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Integration > WI Symbolic URL List**.

The Fixup Administration list appears as the default.

- 2 From the visibility filter, select **Host Administration**.
- 3 In the Host Administration list, add a new record and complete the fields.

You can also modify the default entry in the host table.

The following table describes the fields.

Field	Comments
Authentication Type	Set authentication type to NCSA Basic.
Authentication Value	Enter the authentication value in the format <i>username:password</i> as shown in your license key letter.
Name	Provide a name for the external host. Change the host entry [ServerName] to the Content Services host name provided in your license key letter.
Virtual Name	A virtual name for the external host. This information is provided in your license key letter.

- 4 Restart your server.

## Creating a News Package

A News Package is a subscription to a collection of third-party content sources offered by Siebel Content Services. Your organization may subscribe to several news packages in several different languages. For example, your organization may subscribe to general sources in French, English, or Spanish languages or to specific sources for your industry, such as Finance, High Technology, and Life Sciences. You must set up your Siebel ERM application to include content from the news packages to which you subscribe.

This task is a step in [Process of Setting Up Content Services on page 130](#).

### *To create a news package*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Portal > News Topic Manager**.
- 2 In the News Packages list, add a news package record, and complete the fields.

The following table describes the fields in the news package record.

Field	Comments
Access Group	The groups that have access to the news package.
Inactive	A check mark in this field indicates that the news package is not available to employees.
Name	The name for the external news package. It is recommended that you use the package name provided in your license key letter.
Parameter	This parameter indicates to the Siebel Server the precise content to retrieve. Enter the parameter exactly as it is provided in your license key letter.

After you set up a news package, you can create the news topics. For more information on creating a news topic, see ["Management of News Topics" on page 134](#).

## Management of News Topics

A News Topic is a set of search criteria used to find current news on topics of interest within a news package. [Table 13](#) describes the types of news topics available in Siebel ERM.

Table 13. Siebel Content Services News Topic Types

News Topic Type	Comments
Administrator-Defined	Siebel ERM allows you to create news topics based on the criteria you specify. News topics that you create in the Administrator-Defined view are available to employees within the access groups associated with the news group. Employees with access to the selected news group can choose to include the news topic on a personalized view in the Siebel ERM application.
Predefined	ERM delivers a predefined set of search topics that allow end users to receive current news on topics of interest to them (based on their tracking profile selections). Search topics include headline news, local and regional news, industry news, business topics, sports, health, and more. The search criteria for predefined topics cannot be modified. The topics can only be inactivated or activated. If the topics are inactivated, they do not appear as choices for the end user in the My News Topics view.
User-Defined	Siebel ERM allows users who are associated with the appropriate news group to create news topics based on specified criteria. Administrators can view and manage news topics created by users in the User Defined view.

### Related Topics

[Process of Setting Up Content Services on page 130](#)

[Creating a News Topic on page 134](#)

[Editing a News Topic on page 135](#)

[Deactivating a News Topic on page 136](#)

## Creating a News Topic

As an administrator, you can create, modify, and delete administrator- and user- defined news topics.

### *To create a news topic*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Portal > News Topic Manager**.
- 2 In the News Packages list, query to find the news package for which you want to create a news topic.
- 3 Click one of the following view tabs:

- Administrator-Defined
- User-Defined

4 In the News Topics list, add a new record and complete the fields.

The following table describes the fields for the News Topic record.

Field	Comments
Inactive	<p>The check box is used to deactivate or activate the selected news topic. A check mark appears in this column when the news topic is inactive. Users can only select active news topics in their tracking profile.</p> <p>If you later mark a user-subscribed news topic as inactive, the user no longer sees news for that topic.</p>
Name	Enter an identifying name for the topic. Users see this text description in the Add News Topics form. If the user selects this news topic, this text also appears as a section heading in the My News section of the user's My Briefing page.
Query	Enter the query to be submitted in the news topic search. Queries can be expressed as simple words or strings, as is customary with advanced search syntaxes in most search engines. Multiple terms that do not contain a Boolean expression (AND, OR) are treated as a phrase. Boolean operators (AND, OR) are recognized. Quote marks can be used to demark a phrase. When an operator occurs within quotes it is treated as part of the phrase.

5 Click Preview to see the topic's final format.

#### Related Topic

[Management of News Topics on page 134](#)

## Editing a News Topic

Use the following procedure to modify an news topic.

#### *To edit a news topic*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Portal > News Topic Manager.
- 2 In the News Packages list, query to find the news package associated with the news topic.
- 3 Click one of the following view tabs:
  - Administrator-Defined
  - User-Defined
- 4 In the News Topics list, query to find the news topic.

- 5 In the news topic record, modify the fields as needed.

#### Related Topic

[Management of News Topics on page 134](#)

## Deactivating a News Topic

News topics are preconfigured as active. You can use the News Topics Administration screen to deactivate or activate news topics.

#### *To deactivate a news topic*

- 1 From the application-level menu, choose Navigate > Site Map > Portal Administration > News Topic Manager.
- 2 In the News Packages list, query to find the news topic.
- 3 Click one of the following view tabs:
  - Administrator-Defined
  - Predefined
  - User-Defined
- 4 In the News Topics list, query to find the news topic.
- 5 In the Inactive field, select the check box.

#### Related Topic

[Management of News Topics on page 134](#)

## Retrieving Account and Competitor News for Briefings

Siebel Content Services allows you to include briefings about your accounts, competitors, other organizations, and so on, in your Siebel ERM application. These briefings are retrieved from data within your Siebel application, as well as from external news sources based on your organization's subscriptions with Siebel Content Services.

As an administrator you can create account topics, which are used to associate your Siebel accounts and competitors with external content. You also can associate your organization with a news topic to display company news on the My Briefings page.

Siebel ERM can use the account topics you create to search Siebel Content Services for information about your accounts and competitors.



Siebel ERM uses D&B as its standard for company topics. You use the Account Topic Manager to associate accounts and competitors to D-U-N-S numbers. D-U-N-S numbers are a standard way for external content providers to index company information. If you search using an indexed term, such as the D-U-N-S number, rather than a more generic search term, such as company name, then your search results are more likely to be accurate and relevant.

**NOTE:** D-U-N-S numbers that have been assigned and populated to an account do not always appear. To find out if the D-U-N-S has been assigned, click the drop-down list for the DUNS field. If the D-U-N-S record has already been assigned, it appears in this drop-down list. Click OK and the D-U-N-S record appears in the field.

By associating your accounts and competitors with topics, you also gain access to Siebel Company Vocabulary, which provides access to other common company identifiers, such as its stock ticker symbol. This gives you the ability to configure portal agents to submit different search terms to different content providers—for example, the D-U-N-S number to one content provider or the stock ticker symbol to another.

You can associate multiple accounts from your Siebel database to a single topic. This is an appropriate section when external content services consider several accounts in your Siebel database as a single entity. For example, you can have several divisions of Acme, Inc. (Acme West, Acme East, and Acme South) listed as unique accounts in your Siebel database, while an external content provider may index news based on the parent company, Acme, Inc.

For more information about portal agents, see *Siebel Portal Framework Guide*. For more information about D-U-N-S numbers, see *Applications Administration Guide*.

#### Related Topic

[Process of Setting Up Content Services on page 130](#)

## Associating Accounts and Competitors with News Topics

For news and company information to appear on the My Briefing page, you must link accounts and competitors in your Siebel database to a topic. D-U-N-S numbers are the standard topics used by Siebel Content Services to identify companies. You link accounts and competitors to topics using the Account Topic Manager.

This task is a step in [Process of Setting Up Content Services on page 130](#)

#### ***To create or change a topic association***

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Portal > Account Topic Manager**.

The accounts and competitors from your Siebel database appear in the Accounts list. Name and Location are read-only. If the company is marked as a Competitor in your Siebel database, there is a check mark in the Competitor column.

- 2 In the Accounts list, query for and select the account or competitor you want to associate with a topic.
- 3 In the Company Search form, query for the account or competitor name in the Company Name field.

Matching records from the Siebel Content Services company database (or your selected external content provider database) appear. For example, you might see multiple listings of a company because each location or subsidiary might have its own D-U-N-S number assigned to allow specific searches on that location or subsidiary.

- 4 In the search results list, choose the specific company you want to define for your account or competitor, and click Assign DUNS.

The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

**NOTE:** If your company has purchased Siebel Content Services, you can click the Company Briefing button on the Company Search form to retrieve a briefing on the selected company.

## Associating Your Company with a News Topic

To be able to receive news about your own company in the Our Company section of the My Briefing page, you must associate your company with a topic. To perform this procedure using the Account Topic Manager, you associate a record called Our Company with your company's D-U-N-S number.

This task is a step in [Process of Setting Up Content Services on page 130](#).

### *To associate a topic with your company*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Portal > Account Topic Manager.
- 2 In the Accounts list, query for and select the account or competitor you want to associate with a topic.
- 3 In the Company Search list, query for the account or competitor name in the Company Name field.
- 4 In the search results list, choose the specific company you want to define for your account or competitor, and then click Assign DUNS.

The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

**NOTE:** If there is no company news available, the Our Company in the News section does not appear.

## D & B Account Rationalization Services and News Topics

The D&B Account Rationalization Services automates the association of accounts and topics by matching your account records to D-U-N-S numbers in batch. A link to D&B's Web site appears on the Account Topic Manager view.

For more information, see *Applications Administration Guide*.

### Related Topic

[Process of Setting Up Content Services on page 130](#)

## Viewing a Tracking Profile Summary for News (End User)

Users can view a summary of the tracking profile that determines what news they see.

This task is a step in [Process of Setting Up Content Services on page 130](#).

### Related Topic:

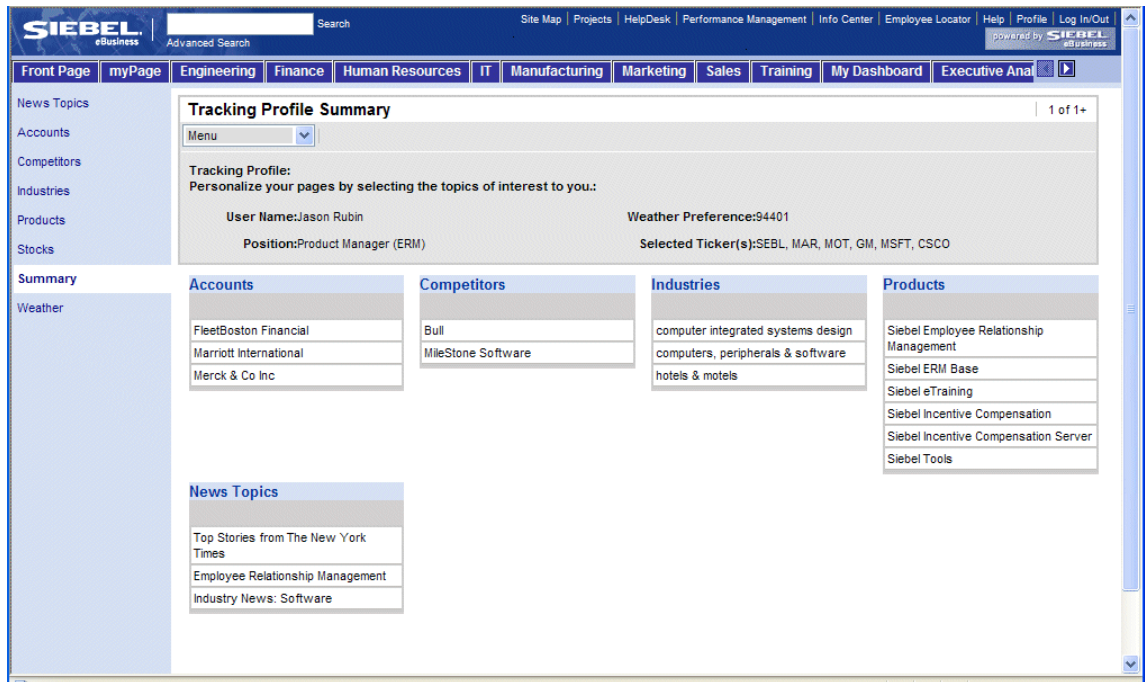
[Controlling ERM Page Topics with a Tracking Profile on page 24](#)

### ***To view a Tracking Profile Summary***

- 1 Navigate to the Profile screen.

- 2 On the Tracking Profile Summary page, view news selections.

The following figure shows an example of a Tracking Profile Summary, with the left navigation bar showing links to news topics, weather, accounts, competitors and so on.



- 3 Click the links in the navigation bar to view additional information.

## Creating a User-Defined News Topic (End User)

Users can customize the news topics that appear on their ERM Home Page.

This task is a step in [Process of Setting Up Content Services on page 130](#).

### *To create user-defined news topics*

- 1 Navigate to the Profile Screen.
- 2 From the Tracking Profile Summary, click the News Topics link in the navigation bar.
- 3 From the News Packages form, click the User Defined view tab, and then click New.
- 4 Enter a name for the query and the query string.

For example, enter the name UAN, and the Universal Application Network query string.

- 5 In the list, select the news topic, and then click Select Topic to move the topic to the My Selected News Topic section.

The user-defined news topic appears the next time the user logs in.

## Previewing a News Topic (End User)

After a news topic has been defined, the user can preview the news topic.

This task is a step in [Process of Setting Up Content Services on page 130](#).

### *To preview a news topic*

- 1 Navigate to the Profile Screen.
- 2 From the Tracking Profile Summary, click the News Topics link in the navigation bar.
- 3 Click either the User Defined view tab, or the Pre-Defined and Administrator Defined view tab.
- 4 Click Preview to view the news.

The previewed news also appears by default on the Home Page when the user logs into the application.

## Resolving Problems with Content Services

The topics in this section provide information that may lead to a resolution when investigating problems with Content Services.

- [External News and Data Do Not Appear on Home Page on page 141](#)
- [News Does Not Appear in the Our Company Section on page 143](#)
- [Not Found Error in the Siebel Mobile Web Client on page 143](#)
- [Users Receive Too Much News on page 144](#)
- [Literature and Bulletins Are Out of Date on page 144](#)

### **Related Topic**

[Process of Setting Up Content Services on page 130](#)

## External News and Data Do Not Appear on Home Page

Your company has purchased Siebel Content Services and you are able to access the Web from your workstation, but you do not receive external news and data on the ERM home page. In this example, the problem may be that a proxy server is being used to insulate your network from the Internet and is not allowing the Siebel application to pass requests through and return data to the application.

#### Related Topic

[Resolving Problems with Content Services on page 141](#)

### Verifying Connectivity with Siebel Content Services Data Host

Verify connectivity with the Siebel Content Services data host using network utilities, such as ping, nslookup, and tracert.

If you do not know the name of the Siebel Content Services data host, you can find it in the license key letter.

### Verifying Your Web Connection and User Credentials

Verify that you have a valid Web connection and that your Siebel Content Services credentials are valid.

#### *To verify your Web connection and credentials*

**1** Open a Web browser on your Siebel server.

**2** Enter one of the following URLs:

- for Content customers:

`http: //{eContent_hostname}/eContent/GetCompanyNames?FI ND=Si ebel`

Change {eContent\_hostname} to the name of your content host.

- for ContentBroker customers:

`http: //{ContentBroker_hostname}/eContent/GetCompanyMI D?FI ND=Si ebel`

Change {ContentBroker\_hostname} to the name of your content host.

A dialog box appears prompting you for your Siebel Content Services user credentials. You can find your user credentials in the license key letter.

**3** Enter your user credentials.

Company information about Siebel should appear. If it does, your user credentials are valid. Skip the next step.

If you receive an “Access Denied” message or other type of message, the proxy server may not be allowing access to the Internet.

**4** If you have received an error message, try to access the URL using a browser on a machine that does not go through the proxy server or firewall and repeat [Step 1](#) through [Step 3](#).

If the problem lies with the Siebel server passing through the proxy server to retrieve data through the Internet, contact your network administrators to resolve the issue.

## Verifying Server Configuration

If you could access the Siebel company information using the previous procedure, then the problem may be in the configuration settings for the proxy server or in the Siebel ERM server configuration files.

### *To test your configuration settings*

- 1 Start the Siebel dedicated Web client in your browser.
- 2 Open a second browser window at the same time and enter the following URL:

```
http://localhost/start.swe?SWECmd=
GotoView&SWEView=SI+Com+Company+Briefing+View&MID=808856512
```

**NOTE:** URLs are case-sensitive.

- 3 Enter valid login credentials, and then click Login.

If external content does not appear, this indicates a configuration problem, either with the proxy server or within the server configuration file.

## News Does Not Appear in the Our Company Section

If news does not appear in the Our Company In The News section of the ERM home page, but it does appear in other news sections, it is likely that you did not assign an account topic to the special “\_Our Company\_” record.

### Related Topics

[Resolving Problems with Content Services on page 141](#)

[Retrieving Account and Competitor News for Briefings on page 136](#)

## Not Found Error in the Siebel Mobile Web Client

If users receive a “404 Not Found” error after clicking Company Lookup in the Account Topic Manager, then the constructed external URL went to a valid host name but specified a URL path that does not exist. This usually indicates that a Symbolic URL is not correctly defined.

### Related Topic

[Resolving Problems with Content Services on page 141](#)

[Setting Up Content Services Host and Authentication Credentials on page 132](#)

## Users Receive Too Much News

If the amount of news and data that is published on a regular basis in Siebel ERM becomes too large, you can change the number of days that news and data are published by changing the argument values in the Administration - Integration > Symbolic URL view. This reduces the amount of information that appears by removing older items.

The number of days for which articles are published is controlled by the HIST argument value in content agents. [Table 14](#) provides an example of the Symbolic URL HIST argument values.

Table 14. Symbolic URL HIST Argument

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/eContent/GetHeadlines	HIST	N	1	Constant	90

The default setting for HIST is 90 days.

You can also change the number of articles that appear. The number of articles that appear is controlled by the MAX argument value in content agents. [Table 15](#) provides an example of the Symbolic URL MAX argument values.

Table 15. Symbolic URL MAX Argument

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/eContent/GetHeadlines	MAX	N	1	Constant	20

The default setting for MAX is 20 days.

If users are receiving news and information about too many accounts or competitors, they can reduce their list of tracked accounts and competitors by modifying their tracking profiles.

### Related Topic

[Resolving Problems with Content Services on page 141](#)

## Literature and Bulletins Are Out of Date

If a literature item or bulletin is no longer useful or it is replaced by a more recent version and the original item has not yet reached its expiration date, you can change the item's expiration date to the current date. This removes the item from the ERM home page.



**Related Topic**

[Resolving Problems with Content Services on page 141](#)



# 11 Setting Up HelpDesk

Siebel HelpDesk allows employees to submit and track service requests through the organization's intranet, and solve problems without assistance by providing access to frequently asked questions and solutions in a Knowledge database.

This chapter describes setting up and using some Siebel HelpDesk features, and resources that administrators can use to set up other features. It includes the following topics:

- [Siebel HelpDesk and Support Organizations on page 147](#)
- [Siebel Employee Service and ITIL Best Practices on page 151](#)
- [Scenario for Siebel HelpDesk on page 153](#)
- [Process of Setting Up Siebel HelpDesk on page 153](#)
- [Setting Up Siebel HelpDesk Responsibilities on page 154](#)
- [Siebel Knowledge Base Setup for HelpDesk on page 155](#)
- [Working with the HelpDesk Solutions Database on page 155](#)

## Siebel HelpDesk and Support Organizations

Siebel HelpDesk is a suite of support solutions which allows organizations to manage service for their internal support organizations. The Siebel HelpDesk module is designed to reduce the support agent's workload while increasing first-contact problem resolution rates. Siebel Automated Solutions allows employees to fix applications, run automated diagnostics scripts on their computers to remotely analyze other employees' computers, chat electronically with other employees, and audit the network for hardware and software inventories.

Using Siebel HelpDesk, organizations can create new help desks to capture information for each internal service situation. Each help desk can include its own subareas and routing rules, and rules can be configured by administrators. This capability allows the organization to provide a single, consistent interface to the support function across departments.

In addition, Siebel HelpDesk provides the tools for asset inventory, digital ID inventory, auto-assignment and other support automation features to reduce the need for intervention by support specialists.

Using Siebel HelpDesk, problems can be tracked and measured against a single service-level agreement (SLA). This capability allows each employee to receive a consistent level of service, and issues are recognized and escalated to facilitate a resolution.

Siebel HelpDesk helps organizations create and maintain a single repository of information so that employees can access the most current answers to questions.

## Siebel HelpDesk Administrator Resources

The following resources are available for the administrator responsible for setting up and configuring Siebel HelpDesk.

### Siebel HelpDesk Entitlements

Siebel HelpDesk provides service entitlement verification of registered users in addition to the standard contact authentication at login. If entitlement verification is active when a user tries to create, update, or view a service request, the application verifies that the user is listed as a contact for a currently valid service entitlement. For more information on setting up service-level agreements, see *Siebel Field Service Guide*.

### Asset Management and Allocation

Administrators can assign assets, such as laptops and RSA tokens, to each employee, add products, and then make the products available as assets, and track and store asset information. For more information, see *Siebel Field Service Guide*.

### Siebel HelpDesk Employee Surveys

The Siebel HelpDesk Employee Satisfaction survey allows organizations to obtain employee feedback using a Web-based form linked to a service request. The employee completes the form, submits it, and the help desk analyzes the results and generates reports.

Siebel HelpDesk Customer Satisfaction Survey questions and labels can be modified using Siebel Tools. For more information on configuring control properties, see *Configuring Siebel eBusiness Applications*.

An administrator also can modify the list of selectable responses for each survey question. For instructions on modifying lists of values, see *Applications Administration Guide*.

### HelpDesk Activity Templates

Siebel HelpDesk agents often perform tasks that require multiple steps. As an administrator, you can create activity templates that provide the framework for agents to complete multistep tasks. The templates that you create can provide detailed steps or instructions for common issues. HelpDesk agents can follow the instructions or tasks within an activity template to resolve customer issues. For more information on setting up Activity Templates with associated activities, see *Applications Administration Guide*.

### Automatic Creation of Attachments

When completing a service request, HelpDesk users can describe each issue in a description field. When the number of characters in the description is greater than the configured number of characters (the default is 2,000 characters) Siebel HelpDesk automatically creates a text file attachment and stores the file to the Siebel file system. The Description field can map to any database column with a character maximum of any specified number, defined by the database table.

To modify this functionality, you use Siebel Tools to configure the Max Description Length user property of the Service Request business component and specify a value for the maximum number of characters for the auto file attachment creation. For detailed instructions on mapping business component fields to database fields other than the default ones, see *Configuring Siebel eBusiness Applications*.

## Email Response

For information on setting up Siebel eMail Response, see *Siebel eMail Response Administration Guide*.

## Troubleshooting Processes and Siebel SmartScript

Siebel SmartScript allows users to perform self-directed question-and-answer sessions that simulate the experience of talking directly with an expert. The sessions can have a predefined process flow, or the flow can be designed to change dynamically according to the customer's response. The process flow can also populate the Siebel database with customer input, to create service requests and complete applications.

As an administrator, you can use Siebel SmartScripts and Siebel eService to create and administer these types of business processes. For more information, see *Siebel eService Administration Guide*. For creating troubleshooting guides and scripts for a help desk agent, see *Siebel SmartScript Administration Guide*.

## Siebel Smart Answer and Siebel HelpDesk

Siebel Smart Answer uses linguistic analysis techniques and content analysis algorithms to perform natural language searches to retrieve solution data. The system has multichannel self-learning capabilities that allows it to adapt successful interactions over the Web, through email, or the Call Center.

If you plan to implement Siebel Smart Answer, consider the following information during your planning process:

- Siebel Smart Answer is recommended for use with Siebel HelpDesk when Siebel Smart Answer is already in use with Siebel eMail Response.
- Siebel Smart Answer searches and displays solution records. The Knowledge Base used with Smart Answer should include solutions associated with available categories.
- You can train the Knowledge Base using email messages and using solutions converted into comma-separated value (CSV) files.
- Check *My Oracle Support* (<http://support.oracle.com>) for recommendations on ways to refine accuracy for Siebel Smart Answer.

For information on set up and implementation of Siebel Smart Answer, see *Siebel eMail Response Administration Guide*.

## Assignment Manager

For information on automatically assigning service requests using Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

## Escalation and Notification

To use the escalation and notification engine, see *Siebel Business Process Designer Administration Guide*.

## CTI Integration and CTI Connect

For more information on configuring and setting up the communications server for Siebel HelpDesk, and configuring and setting up communication middle ware see *Siebel Communications Server Administration Guide*.

## Universal Queuing

For more information on universal queuing, see *Siebel Universal Queuing Administration Guide*.

# Siebel Employee Service and ITIL Best Practices

The Information Technology Infrastructure Library (ITIL) provides a best-practices methodology that you can use to plan and implement common HelpDesk processes, roles, and activities, and define interrelationships and communications strategies. Although ITIL primarily addresses Information Technology functional processes, its methodology can be applied to other support functions.

ITIL can be applied to a number of service areas, however its primary focus is IT Service Management (ITSM). IT Service Management is divided into two areas, Service Support and Service Delivery. Together, these areas encompass 10 disciplines that can help you manage the provisioning and maintenance of IT services.

The core business processes include:

## ITSM Service Support

- [Incident Management on page 151](#)
- [Problem Management on page 152](#)
- [Change Project Management on page 152](#)
- [Asset Management and Siebel Automated Service on page 152](#)
- [Release Management on page 153](#)

## ITSM Service Delivery

- [Service Level Management \(SLM\) on page 153](#)

## Overview of the Employee Service Lifecycle

The service lifecycle begins with an individual incident. The incident might be a problem experienced by an organization's employee, or the incident might be identified as part of a larger problem that is affecting the organization's infrastructure. The Incident record becomes a Problem record, and other related incidents are associated with the problem. If a temporary solution is identified, the workaround is also associated with the problem record. When the root cause of the problem is identified, the problem record becomes a Known Error. A Change Request is associated with the Known Error to document and manage the actions necessary to resolve the Known Error.

## Incident Management

Incident Management automates the process of reporting and tracking an incident or groups of incidents. HelpDesk operators can open incident reports to document and flag problems with software, equipment, facilities, network problems, and so on. Managers and technicians can track the status and activities performed to achieve resolution as the categorized Incident moves through the stages of Problem, Known Error, and a Request for Change.

HelpDesk can be configured to automatically create incident reports using the Siebel Automated Service product. For more information, see *Siebel eBusiness Third-Party Bookshelf* documentation for SupportSoft's Resolution Suite applications.

### Problem Management

In the ITSM Service Support process, a Problem is identified when the following conditions exist:

- Data reveals that incidents are recurring.
- Data shows that incidents are not associated with existing known errors.
- An IT infrastructure analysis shows that a problem could lead to incidents.
- A major incident occurs for which a structural fix is needed.

The HelpDesk agent adds a problem record to the database, and then links the associated incident records to the problem record. If solutions and workarounds exist, they are detailed in the problem record.

### Change Project Management

The Change Management system can help an organization manage incremental improvements and targeted modifications to a product or process. If a change to the physical environment is required to close a Problem record or Known Error record, then a Change Project is created. Change Project Management broadens the scope of management oversight to encompass large-scale modifications such as upgrades to central servers and network or telecommunication system installations. Each Request for Change associated with the Change Project is assigned a unique identifier, and follows an established process flow consisting of approvals, alerts, tasks (if required), phases, and closure. When the Change Project is successfully implemented, the project is closed and associated Requests for Change and Problem records are also closed.

### Asset Management and Siebel Automated Service

Establishing an Asset Management system can help the organization monitor the status and disposition of assets such hardware and software. Other Siebel HelpDesk applications can access the asset database information to automate routine data entry tasks. For example, if a HelpDesk agent opens an incident report, Incident Management can retrieve the asset information from the inventory database, and the information is automatically entered in the incident report. The user profile and the responsibilities assigned to the user by the administrator determine the user's access to the database.

The Siebel Automated Service product can be configured to automatically update inventory records with device configuration information entered in the Asset Management system by network agents. For more information on how to configure the Asset Auto-Discovery and Software License Discovery functionality, see the third-party documentation for SupportSoft/ADM on *Siebel eBusiness Third-Party Bookshelf*. For more information on setting up assets, see *Siebel Field Service Guide*.



## Release Management

Organizations can manage and schedule the release of software patches and upgrades using the Release Management process. For more information, see *Siebel eBusiness Third-Party Bookshelf* for SupportSoft Release Management (thirdparty/supportsoft/resolution suite).

## Service Level Management (SLM)

Service Level Agreement Management helps the organization increase employee satisfaction with IT services. When an Incident or Request for Change is logged, the employee provides information that is used to verify entitlement to service. Based on this information, an entitlement is associated with the employee. The entitlement specifies a date and time commitment for closing the service request. For more information on setting up Service Level Agreements, see *Siebel Field Service Guide*.

## ITIL Reports

For more information on analysis reports available for ITSM Service Support and Delivery business processes, see *Siebel Analytics User Guide*.

# Scenario for Siebel HelpDesk

This scenario provides an example of a process performed by a Siebel HelpDesk administrator, agent, support representative, and a help desk requestor. Your company may follow a different process according to its business requirements.

## Administrator

An organization using Siebel ERM hires a new employee. The administrator assigns the appropriate responsibilities to the employee so that the employee can access the help desk. The administrator assigns the employee a laptop computer and records the asset distribution using Siebel HelpDesk.

The administrator creates a number of solution records, which include answers to frequently asked questions about the organization's 401(k) retirement plan.

To assess the effectiveness of the help desk in resolving problems, the administrator modifies the employee satisfaction survey to pose questions about this area before it is sent to users.

# Process of Setting Up Siebel HelpDesk

This section describes procedures typically performed by administrators when setting up Siebel HelpDesk. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up Siebel HelpDesk, perform the following procedures:

- 1 [Setting Up Siebel HelpDesk Responsibilities on page 154](#)

- 2 [Siebel Knowledge Base Setup for HelpDesk on page 155](#)
- 3 [Working with the HelpDesk Solutions Database on page 155](#)

## Setting Up Siebel HelpDesk Responsibilities

Before a user can run Siebel HelpDesk, you must associate the user with the appropriate responsibilities.

Siebel ERM is preconfigured with several responsibilities that are specific to Siebel HelpDesk. Organizations can use these preconfigured responsibilities to set up help desk users. [Table 16](#) describes the preconfigured help desk responsibilities.

The responsibilities can be used as-is during a deployment, or they can be modified to meet the needs of the particular organization. The preconfigured responsibilities can be used as a guide for creating new responsibilities.

The Views and Users subview lists at the bottom of the screen allow you to specify the users assigned to the selected responsibility, and the views that each user can access. You can add or remove views according to your organization's needs, or you can create a new responsibility. For more information on creating and modifying responsibilities, see *Security Guide for Siebel eBusiness Applications*.

This task is a step in [Process of Setting Up Siebel HelpDesk on page 153](#).

Table 16. Preconfigured Siebel HelpDesk Responsibilities

Responsibility	Comments
HelpDesk Agent	Users with this responsibility can access the Siebel HelpDesk views.
Universal Agent	Users with this responsibility can access the Call Center views.
ERM User, Manager	Users with the ERM Manager or ERM User responsibility can access the Siebel HelpDesk.

### ***To set up Siebel HelpDesk agent responsibilities***

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Application > Responsibility List**.
- 2 In the Responsibilities list, query to find the responsibility with which you want to associate an employee.
- 3 In the Users subview list, click **New**, query to find the user you want to add, and then click **OK**.  
The user is associated with the selected responsibility.
- 4 In the Views subview list, click **New**, query to find the views to which the selected user has been given access, and then click **OK**.

# Siebel Knowledge Base Setup for HelpDesk

Siebel ERM provides an integrated, searchable knowledge database of solutions information that HelpDesk agents can develop and use to provide consistent data and answers to customer questions. Using Siebel Service, customers can search a library of categorized solutions and SmartScripts, or obtain answers using Siebel Smart Answer.

For more information, see *Siebel eService Administration Guide*, *Siebel SmartScript Administration Guide*, and *Siebel Smart Answer Administration Guide*.

## Related Topic

[Process of Setting Up Siebel HelpDesk on page 153](#)

# Working with the HelpDesk Solutions Database

Solutions are answers to frequently asked questions. Solutions are documented by service agents and call center administrators and are stored in the database. HelpDesk agents document solutions, and agents and customers can frequently resolve service issues by searching this knowledge database. Employees can search the database and retrieve solutions to common problems without having to wait for help desk personnel to become available.

To publish Siebel Solution records, you must first create the solution records and then categorize them using the appropriate Siebel ERM catalogs. After the solutions are categorized, they appear in the appropriate views. To restrict user access to specific categories, you can apply access control to the categorized solutions. After the solution record is created, you must associate the record with the appropriate category.

- For more information creating solutions, see *Siebel eService Administration Guide* and *Siebel Field Service Guide*.
- For more information on catalog and category administration, see *Siebel eSales Administration Guide*.
- For information on setting up auto response for solutions, see *Siebel Smart Answer Administration Guide*.

This task is a step in [Process of Setting Up Siebel HelpDesk on page 153](#) and includes a number of related tasks.

## Related Tasks

- [Categorizing Solutions on page 156](#)
- [Creating a Resolution for HelpDesk Users on page 156](#)
- [Categorizing a HelpDesk Resolution on page 157](#)

## Categorizing Solutions

You can use the Catalog Administration view to associate solutions with a category. For example:

- To display solutions in the General FAQs list in Siebel HelpDesk, the Solutions must be categorized in the catalog called ERM Catalog.
- To display solutions in the Top FAQs list in Siebel HelpDesk, the solutions must be categorized in the catalog called ERM Top Solutions, and the category called ERM Top Solutions.

### ***To add a solution to a Siebel ERM Category***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Catalog > Catalog Administration.
- 2 In the Catalog list, query to find ERM Catalog.
- 3 In the ERM Catalog record, click the link in the Name field.
- 4 In the Categories list, select the category.  
Expand the Category folder to see subcategories.
- 5 From the categories list, click the Solutions link, and in the Solutions list, add a new record.
- 6 In the Add Solutions dialog box select the solution information you want to add to the category, and then click OK.

The selected solution is associated with the category.

## Creating a Resolution for HelpDesk Users

A resolution is a content item, typically a text document or product literature item, which includes information that is relevant to solving a service request. To make a resolution available to Siebel HelpDesk users, you perform the following tasks:

- 1 Adding the desired content to the literature catalog. You can specify a path, browse for a file, or link to the file through a URL. For more information about literature, see *Applications Administration Guide*.
- 2 Create a resolution record, provide a name for the resolution item, and specify the type of the resolution item that has been added.
- 3 Optionally, associate the resolution item with a resolution category.
- 4 Associate the literature that has been added to the catalog to one or more catalog categories.  
For more information on catalog and category administration, see *Siebel eSales Administration Guide*.

### ***To create a resolution for Siebel HelpDesk***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Resolution Documents.

- 
- 2 In the Resolutions Documents list, add a new record, specify a type, and complete the remaining fields.

## Categorizing a HelpDesk Resolution

You can use the Catalog Administration view to associate existing resolutions with a category.

### *To add a resolution to a category*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Catalog > Catalog Administration.
- 2 In the Catalogs list, query to find ERM Catalog or ERM Top Solutions.
- 3 In the catalog record, click the link in the Name field.
- 4 In the Categories list, select the category with which you want to associate the resolution.
- 5 Click the Resolution Item link.
- 6 In the Resolution Items list, add a record and complete the fields.



# 12 Setting Up Employee Self-Service

Siebel Employee Self-Service (ESS) helps managers and employees process routine and frequent transactions such as completing an employee address change or transferring an employee. Employee Self-Service guides users through the necessary procedures, incorporates relevant data, accepts user input, and automatically routes transactions for processing and approvals.

This chapter provides information on creating and maintaining Employee Self-Service. It includes the following topics:

- [Scenario for Employee Self-Service on page 159](#)
- [Process of Setting Up Employee Self-Service on page 160](#)
- [Creation of Employee Self-Service Forms on page 162](#)
- [Importing a Preconfigured Employee Self-Service Form on page 163](#)
- [Customizing a Preconfigured Self-Service Form on page 165](#)
- [Designing Employee Self-Service Requestor Forms on page 165](#)
- [Creating an Employee Self-Service Summary Form on page 169](#)
- [Linking Self-Service Forms to the Inbox on page 171](#)
- [Associating ESS Forms with Employee Directory on page 172](#)
- [Releasing and Testing Employee Self-Service Forms on page 172](#)
- [Accessing and Submitting Self-Service Forms on page 173](#)

For examples of Employee Self-Service forms, see the following chapter:

- [Appendix 15, "Employee Self-Service Reference"](#)

## Scenario for Employee Self-Service

This scenario provides an example of processes performed by a Human Resources department administrator and Human Resources representatives. Your company may follow a different process according to its business requirements.

### Administrator

The Human Resources administrator for a financial organization spends a lot of time entering information collected on employee transaction forms into the company's databases. Because the administrator designs and administers the forms for the HR department, she receives queries from employees uncertain about which fields in the forms are relevant to the particular transaction. She also notes that some users complete too many fields in the form, and others leave required fields uncompleted, which results in the forms being returned to the employees for amplification.

To resolve these problems, the HR administrator uses Employee Self-Service to implement a process that can handle personnel actions, which include changes in the employee's business title, division, position, manager, location, and so on. In this example, the Personnel Action Form (PAF), is available preconfigured in Employee Self-Service. The personnel action form is typically used by managers to request changes for a person reporting to them or for a prospective report.

### Manager

A manager at the organization wants to promote one of her direct reports. She logs in to her Siebel application and navigates to the HelpDesk, which provides a link to the Employee Self-Service forms library. She finds the link for the Personnel Action Form (PAF), and reviews the screens, and adds information when necessary. She submits the form, which is automatically routed for approval.

### Approver

The organization's approvers—line managers, HR representatives, and functional groups—must accept the employee change before it can be implemented.

When the final approval is acquired, the Siebel ERM application sends the updated data to the appropriate systems.

### Employee

The promoted employee logs in to the Siebel application. The employee navigates to his employee profile and sees that his title has changed.

## Process of Setting Up Employee Self-Service

The following lists show the procedures that administrators and end users typically follow to set up and use Employee Self-Service. Your company may follow a different process according to its business requirements.

### Administrator Procedures

You can import and customize preconfigured forms and create new forms. As [Figure 13](#) shows, the administrator process has two paths. The first path illustrates importing and customizing preconfigured Employee Self-Service forms. The second path is for creating requestor and summary forms. After importing or creating the forms, the administrative process proceeds to testing and releasing the forms.

To set up Employee Self-Service, perform the following procedures:

- [Importing a Preconfigured Employee Self-Service Form on page 163](#)
- [Customizing a Preconfigured Self-Service Form on page 165](#)
- [Designing Employee Self-Service Requestor Forms on page 165](#)



- Creating an Employee Self-Service Summary Form on page 169
- Linking Self-Service Forms to the Inbox on page 171
- Associating ESS Forms with Employee Directory on page 172
- Releasing and Testing Employee Self-Service Forms on page 172

## End-User Procedures

The end-user process has a single path for requestors. As Figure 13 shows, the first item in the process is for a requestor to choose a form. The process leads to the type of changes the requestor wants, after which the submit process is activated. The form is then routed to the approver's Inbox.

To use Employee Self-Service, perform the following procedure:

- Accessing and Submitting Self-Service Forms on page 173.

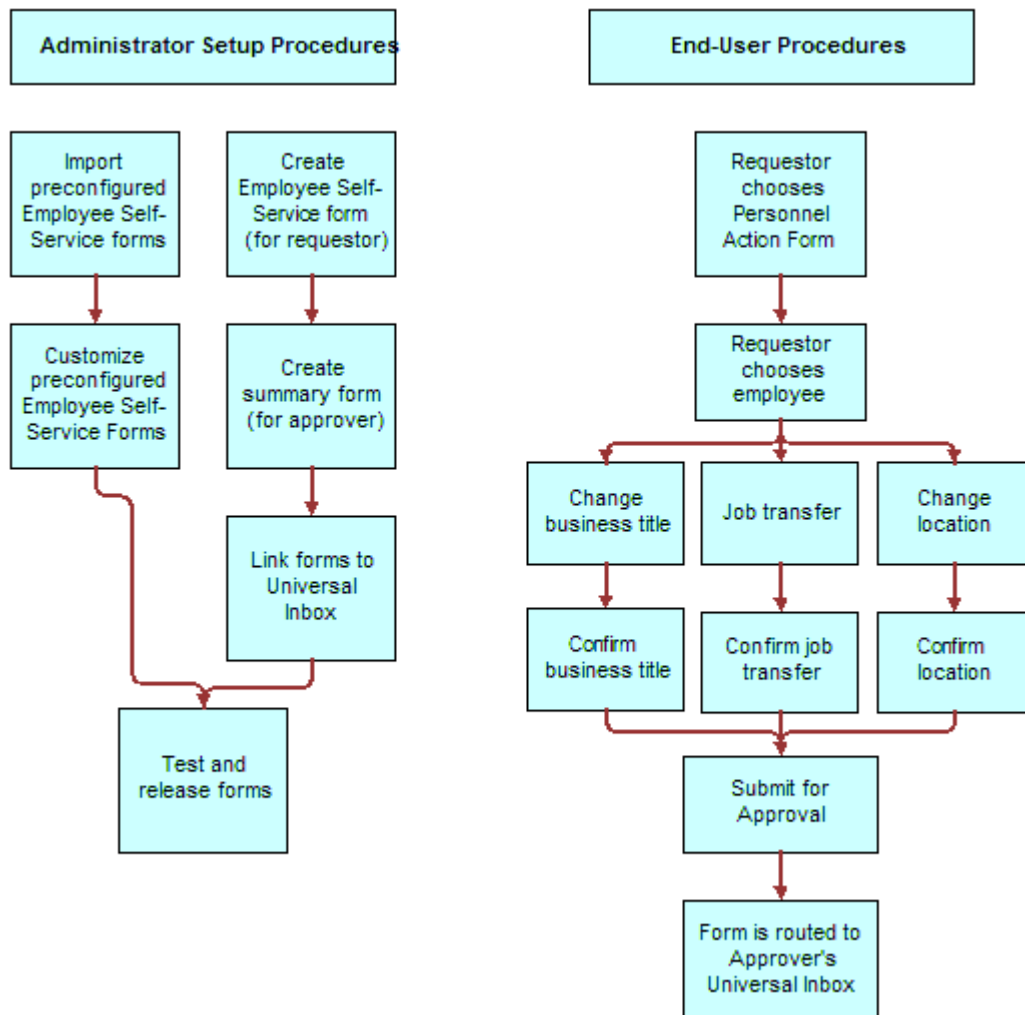


Figure 13. Business Process for Employee Self-Service

## Creation of Employee Self-Service Forms

You can use the Employee Self-Service feature to create employee self-service processes (or forms), or you can use preconfigured forms provided with your Siebel application.

**NOTE:** Siebel Employee Self-Service uses Siebel SmartScript to create forms. For more information on creating and implementing SmartScripts, see *Siebel SmartScript Administration Guide*.

An employee self-service process starts with an electronic document or form that includes input fields to collect information from users. Based on the information entered, the form logically presents options that can be used to obtain additional user information. The automated logic used in employee self-service processes is also known as *branching logic*.

As illustrated in Figure 14, branching logic is used in employee self-service processes. The illustration shows an employee self-service form with two pages. The first page has process arrows pointing to four questions. The first question leads to three possible answers. The first answer leads to the second page. The second answer leads to the fourth question. The third answer leads to the third question. Based on a user's entries in an employee self-service form, there can be one of several outcomes.

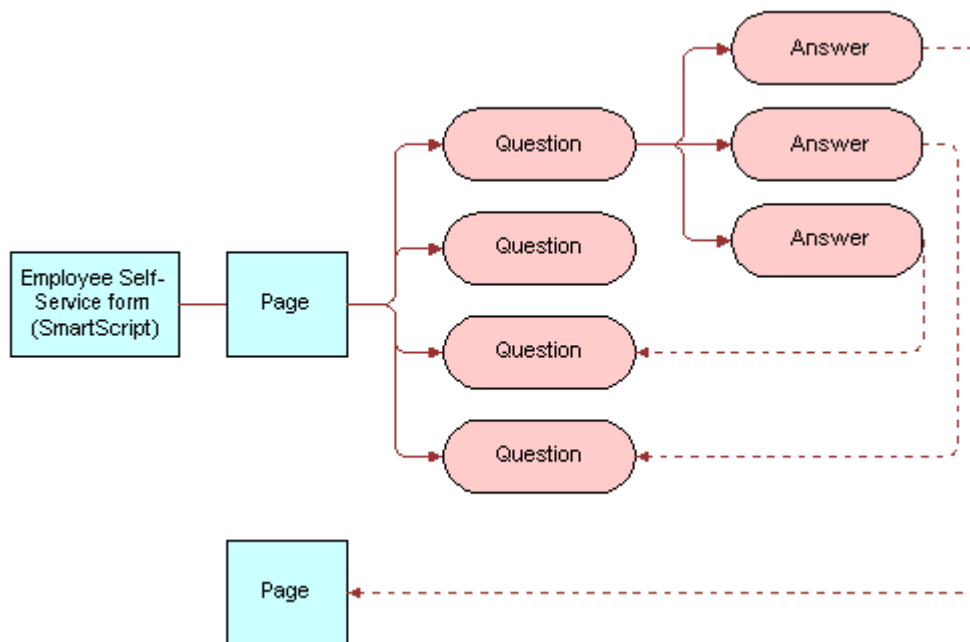


Figure 14. Example of Branching Logic for Employee Self-Service

Employee Self-Service allows you to build employee self-service processes that include the following attributes:

- The processes use branching logic that targets specific user needs.
- The processes are already populated with data from Siebel applications and other databases.

- The processes accept input from users and send relevant changes to the underlying databases after approval.
- The processes can be routed through a graphical workflow editor for further processing and approvals.

Employee Self-Service also includes a preconfigured set of self-service forms. These forms address common issues such as personnel and personal data changes.

After creating an employee self-service form, you can use the Inbox functionality to create an approvals business process that automatically routes the form to specific users for approval. Based on the data entered in the form, your Siebel application or another application can be updated.

### Related Topics

See *Applications Administration Guide* for Inbox setup tasks.

[Process of Setting Up Employee Self-Service on page 160](#)

## Importing a Preconfigured Employee Self-Service Form

Siebel Employee Self-Service is preconfigured with several employee forms. These preconfigured forms can be imported to your Siebel application as SmartScripts. After they are imported, the forms can be verified and then released so that you can use them within your Siebel application.

[Table 17](#) describes the preconfigured forms for Employee Self-Service and the types of changes addressed in each form.

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

Table 17. Preconfigured Employee Self-Service Forms

Form	Comments
Calling Card Request	This form is used for ordering new calling cards
Check FMLA Eligibility	This guided form helps employees find out whether they are eligible for FMLA (Family Leave Medical Act)
Employee Survey	This is a workplace survey administered to employees
Executive Center Booking	This form lets employees book the Executive Center for customer meetings
New Hire Process	This form is used for provisioning a PDA, computer, workspace, and training for a new employee

Table 17. Preconfigured Employee Self-Service Forms

Form	Comments
Personal Data Change	<p>This form is used for changes to:</p> <ul style="list-style-type: none"> <li>■ Name</li> <li>■ Address</li> <li>■ Cell phone number</li> </ul>
Personnel Action Form (PAF)	<p>This form is used for changes to:</p> <ul style="list-style-type: none"> <li>■ Business title</li> <li>■ Job transfer (Position/Manager/Division Change)</li> <li>■ Location</li> </ul>
Time Off Form	This form is used for vacation, sick leave, and other time-off requests

### ***To import employee self-service forms (SmartScripts) from the sample database***

- 1 Log in to your Siebel application using the sample database.
- 2 From the application-level menu, choose View > Site Map > Administration - SmartScript > Scripts.
- 3 In the Scripts list, select a form (SmartScript), listed in [Table 17](#) to export to your production environment:
  - a In the Scripts list, click the menu button, and then choose Export Script.  
The Export Script form appears.
  - b Click the form (SmartScript) name hyperlink, and then save the form (SmartScript) to a temporary location so that you can import it into your production environment.

Repeat [Step 2](#) through [Step b](#) for each SmartScript form you want to use in your production environment, and then log out of your Siebel application.

### ***To import the form to the production environment***

- 1 Log in to your Siebel application again, using the production database.
- 2 From the application-level menu, choose View > Site Map > Administration - SmartScript > Scripts.
- 3 In the Scripts list, click the menu button, and then choose Import Script.  
The Import Script form appears.
 

**NOTE:** In the form, select Update in the In case of error field. When importing preconfigured employee self-service forms, choose the Update option. If a script with the same name already exists, the newly imported script replaces the old one.
- 4 In the File Name field, click the select button.

- 5 In the Add Attachment dialog box Browse for the saved SmartScript form.
- 6 From the Add Attachment dialog box, click Add, and then from the Import Script form click Import File.

**NOTE:** Each imported form should be tested and then released.

## Customizing a Preconfigured Self-Service Form

You can customize the preconfigured employee self-service forms to meet your organization's needs. For example, you can change the sequencing of the pages and questions, and you can add, delete, and change questions.

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

### *To customize a preconfigured employee self-service form*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.
- 2 In the Scripts list, select the script you want to change, and then click the Designer view tab. The graphical layout for the preconfigured form appears.
- 3 Update the questions and pages as needed, and then test and release the script.  
For more information, see ["Releasing and Testing Employee Self-Service Forms" on page 172](#).

**NOTE:** For more information about updating a SmartScript, see *Siebel SmartScript Administration Guide*.

## Designing Employee Self-Service Requestor Forms

The Employee Self-Service Requestor Form is used by a manager or an employee to request a change in employment information. The change might be a personnel action such as a promotion, or a change to an employee's marital status. Requestor forms are grouped in the Forms Library, which is accessible from the HelpDesk home page.

As an administrator, you can use Siebel SmartScripts to define the requestor forms used within your application. Before you define a form, verify that the following requirements are met:

- You are familiar with Siebel application user interface standards.
- You are familiar with Siebel SmartScript. For more information on SmartScript, see *Siebel SmartScript Administration Guide*.
- If you are planning advanced scripting initiatives, you are familiar with Siebel Visual Basic or Siebel eScript programming and have an understanding of your company's Siebel application installation.

- If the script is run in multiple languages, you have access to translations of script elements for each language.

### Before You Begin

Before you create an Employee Self-Service requestor form, perform the following tasks:

- 1 Map out the form.** Design on paper the requestor form you want to create. Use the flow diagram example shown in [Figure 14 on page 162](#) to determine the pages to include within your form (SmartScript), and the questions you want to include in each page.
- 2 Create Questions and Pages.** Before you actually create a form, create the questions and pages used in the form. For information on creating questions and pages, see *Siebel SmartScript Administration Guide*.

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

### To create a form for a requestor

- 1** From the application-level menu, choose [Navigate > Site Map > Administration - SmartScript > Scripts](#).
- 2** In the Scripts list, add a new record and complete the fields.
  - a** In the Type field, select Employee Self-Service.

SmartScripts that are set to the Employee Self-Service type automatically appear in the Forms Library. When creating a form in a language other than English, choose the type that corresponds to Employee Self-Service.
  - b** In the First Page field, select the first page you created for the form.
- 3** Click the Designer view tab, and using the Script Flow Chart, insert questions and pages as needed from the set that you previously created.
- 4** Release the script, test it, and, if necessary, make changes and rerelease the script.

### Related Topics

[Releasing and Testing Employee Self-Service Forms](#)

[Linking Self-Service Forms to the Inbox](#)

[Effective Scripting for Employee Self-Service Requestor Forms](#)

## Effective Scripting for Employee Self-Service Requestor Forms

Using scripting is not required within Employee Self-Service, however, the functionality of the Employee Self-Service forms can be enhanced through the use of eScript or VBScript. This section provides procedures and tips for using eScript within requestor forms. You can also use VBScript.

**NOTE:** You can use the eScripts within the preconfigured forms as examples. For more information on scripting, see *Siebel SmartScript Administration Guide*.

### Related Topic

[Process of Setting Up Employee Self-Service on page 160](#)

## Making a Field Read-Only

You may want to make some fields in a requestor form read-only to provide information to requestors, but prevent them from making any changes to the data in the field.

### *To make a field read-only in a requestor form*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - SmartScript > Scripts**.
- 2 In the Scripts list, query to find the Employee Self-Service form (SmartScript) you want to modify.
- 3 Click the Programs view tab.
- 4 From the Programs list, select **Script\_Open**.
- 5 In the Program Language field, select **eScript**, and then click **Save**.

In the eScript form, use the script function `SetQuestionEnable(false)` to set the question to read-only.

For example, the following eScript program converts a question titled **Display Employee Last Name** within a page titled **PAF Change**. When this question displays a value extracted from a database, the value is read-only.

```
function Script_Open ()
{
var P1 // SmartScriptPage
var P1Q1 // SmartScriptQuestion
P1 = GetPage("PAF Which Change");
P1Q1 = P1.GetQuestion("Display Employee Last Name");
P1Q1.SetQuestionEnable(false);
}
```

```
}
```

- 6 Verify that each read-only field has a `SetQuestionEnable(false)` statement attached to it.
- 7 In the eScript form, click Check Syntax to locate any syntax problems.
- 8 In the Programs list, click Save.

## Preventing Duplicate Record Creation

When the form is submitted, field values mapped to a business component field are automatically written to the actual fields by SmartScript. To prevent Siebel ERM from writing to the business component field and creating duplicate records, include the `Cancel()` function within the `script_finish` program.

### *To prevent duplicate record creation*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.
- 2 In the Scripts list, select the script, and then click the Programs view tab.
- 3 In the Programs list, select `Script_Finish`.
- 4 In the Program Language field, select eScript, and then click Save.
- 5 In the eScript field, include the `Cancel ()` function.

For example, the following statement runs the entire SmartScript, but no updates are saved to the database, even after the user chooses Submit.

```
function Script_Finish ()
{
  // Cancel saving everything to the database
  Cancel ();
}
```

- 6 To make sure that data entries are always saved, whether the form is complete or incomplete, select Always in the Save Session field.

When the form is complete, choose Finished to save data entries.

**NOTE:** Selecting Finished or Always from the Save Session field forces your Siebel application to write the values to the SmartScript session tables.

- 7 Click Check Syntax to locate syntax issues, and save the record.

## Populating a Field in a Form

You can use eScript to automatically populate a form.



***To populate a field in a form***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.
- 2 In the Scripts list, select the script you want to modify, and then click the Programs view tab.
- 3 In the Programs list, select Script\_Open.
- 4 Use the eScript function SetCurrentValue for each field you want to populate.
- 5 Click Check Syntax to locate syntax issues.
- 6 Save the program.

## Creating an Employee Self-Service Summary Form

A summary form is used to provide a read-only, summary of a completed form to an approver. The approver can review the information in a summary form, and then decide whether to approve or deny the request. As an administrator, you can use the Employee Self-Service module to create a summary form.

### Before You Begin

Before you create a form, complete the following tasks:

- 1 Map out the summary form. Use the flow diagram example shown in [Figure 14 on page 162](#) to help decide the pages to include in your form and the questions you want within each page.
  - The questions within a summary form are only used to display data to the user.
  - Use the requestor form that you previously created to help you determine which questions you want to use in the summary form. Typically, a summary form shows the approver only a subset of the most relevant responses from the requestor form.
- 2 Determine the questions and the pages used in the summary form. For more information on creating SmartScript questions and pages, see *Siebel SmartScript Administration Guide*.
- 3 If you plan to copy a question from the requestor form, add the word Summary to the title, as you cannot use the same names for both the requestor form question and the summary form question. This naming convention rule also applies to naming pages and the SmartScript itself.

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

***To create a summary form for an approver***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.

- 2 In the Scripts list, add a new record, complete the fields, and save the script.

The name should identify the form as a summary form. Do not use the same name as the requestor form.

Leave the Type field empty. Do not set the Type field to Employee Self-Service because the summary form would then become visible to requestors. Two forms with similar names can confuse the requestors.

- 3 Click the Programs view tab, and add a program record.
- 4 In the Program record, choose Script\_Open in the Name field.
- 5 Choose eScript in the Program Language field.
- 6 In the Script form, use eScript (or VBScript) to set up the summary form.

After you finish scripting, release the script, test it, and then make necessary changes and release the script again.

### Importing Field Values to a Summary Form

After the summary form is completed and submitted, the questions and answers are saved in SmartScript session table. For a summary form, the Script\_Open script is used to read the values and assign them to the questions.

#### *To import field values from requestor to summary form (without page breaks)*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.
- 2 In the Scripts list, select the script and click the Programs view tab.
- 3 In the Programs list, create a program.
- 4 In the new program record, select Script\_Open in the Name field, and eScript in the Program Language field.

**NOTE:** If you access a business component within your summary form, any operation to that business component creates a page break within the summary form. To avoid the page break, get the handle to the business component in the eScript. Perform any desired operations on it within the eScript. For more information, see [“Example eScript for Summary Form” on page 192](#).

- 5 (Optional) In the Script form, use the eScript function SetQuestionEnable(false) at Script\_Open to set a question to read-only.

For more information, see [“To make a field read-only in a requestor form” on page 167](#).

- 6 In the Script form, use the GetParameter function to get the script session ID.

For more information on using GetParameter, see [“Example eScript for Summary Form” on page 192](#).

- 7 Query for the Call Scripts business object with Call Script Run Answers business component.

For more information on ways to get the Call Scripts business object, see [“Example eScript for Summary Form” on page 192](#).

- 8 In the Programs list, click Save.

## Linking Self-Service Forms to the Inbox

To route an employee self-service form to the Inbox, the form and the inbox must be linked. [Figure 15](#) shows the business process used when linking the form and the Inbox.

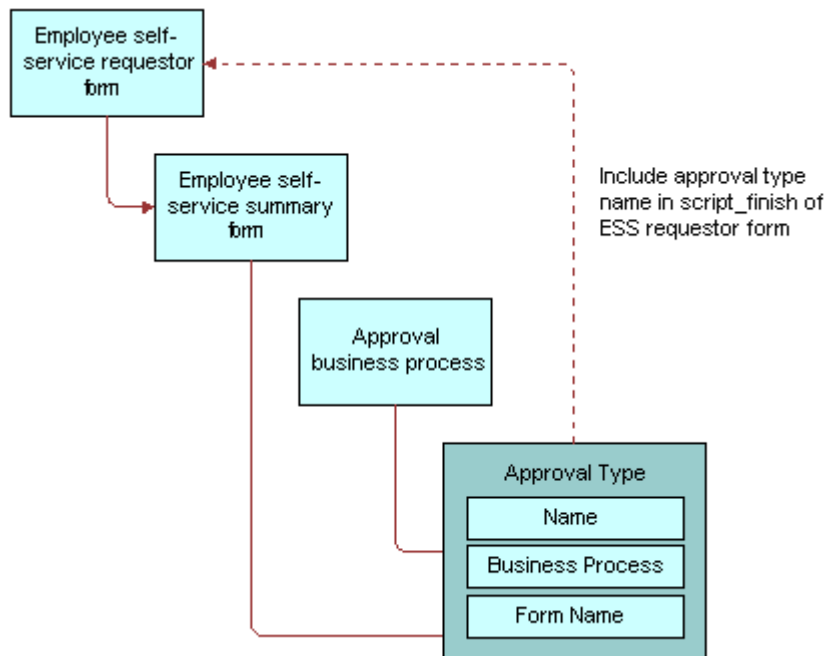


Figure 15. Linking Employee Self-Service Form to Inbox

As an administrator, you can create an approval type to link a form to the inbox. After the approval type is configured, you can reference the approval type name within the employee self-service requestor form. For information about creating an approval type, see *Applications Administration Guide*.

**NOTE:** The following procedure is required only for new Employee Self-Service forms, not for preconfigured forms. For more information on creating an Employee Self-Service form, see [“Designing Employee Self-Service Requestor Forms” on page 165](#).

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

### To link employee self-service forms to the Inbox

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.
- 2 In the Scripts list, select the Employee Self-Service form (SmartScript) you want to link to the Inbox.

- 3 Click the Programs view tab, and in the Programs list, add a new record and complete the fields.
  - a In Name field, select Script\_Finish from the drop-down list.
  - b In the Program Language field, select eScript from the drop-down list, and then click Save.
- 4 In the eScript form, enter the script as shown in [“Example eScript for Requestor Form” on page 191](#).
 

**NOTE:** The eScript form appears at the bottom of the screen. You may need to scroll down to see the entire form.
- 5 In the Script field, change the `indata.SetProperty ("ItemType", "")` parameters as needed. The second parameter of the function should equal the name of the appropriate Inbox type. For example:
 

```
// Approvals Inbox Administration screen
indata.SetProperty ("ItemType", "PAFChange");
```

**NOTE:** For more information on Inbox types, see *Applications Administration Guide*.
- 6 Click Check Syntax to locate syntax issues.
- 7 Save the program record.

## Associating ESS Forms with Employee Directory

You can associate Employee Self-Service (ESS) forms with Employee Directory. For more information, see [Linking ESS Forms, Literature, and Solutions to Employee Directory on page 38](#).

## Releasing and Testing Employee Self-Service Forms

After you finish scripting the employee self-service form, you must first release the script, test it to make sure that it works as anticipated, and release the script again if you have made changes.

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

### *To release a script*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - SmartScript > Scripts.
- 2 In the Scripts list, select the script, and then click Release.

- 3 Test the form to make sure that it works as desired.

For more information, see [“Accessing and Submitting Self-Service Forms” on page 173](#).

**NOTE:** Examine the logic in the forms to determine whether any customizing is required. For more information on making changes to preconfigured forms, see [“Customizing a Preconfigured Self-Service Form” on page 165](#).

- 4 After you have tested the form, make any necessary changes to the form, and then release it again.

## Accessing and Submitting Self-Service Forms

End users can access forms in the Self-Service area of the HelpDesk Home page, or from the Employee Self-Service link on the site map. After a user selects the appropriate form, the form can be completed and submitted for approval.

**NOTE:** Administrators can use this procedure to test the forms before final release.

This task is a step in [Process of Setting Up Employee Self-Service on page 160](#).

### Accessing Self-Service Forms

End users can access self-service forms using the HelpDesk home page.

#### *To access an employee self-service form*

- 1 Navigate to the HelpDesk home page.
- 2 From the Self-Service Section, click the Forms Library link.
- 3 In the Available Forms list, click the link in the Name field for the form you want to access.
- 4 In the form, complete the necessary fields, and then click Submit.

Required questions are flagged with an asterisk (\*).

**NOTE:** Forms can be saved and submitted at a later time even if they are not completed. To save the form and the information you have entered, click **Submit Later**. You can access a saved form from the **My Saved Forms** view.

If the form is linked to the Inbox, the form is sent on to the first approver.

### Accessing a Saved Self-Service Form

Use the following procedure to access a saved employee self-service form.

#### *To access a saved form*

- 1 Navigate to the HelpDesk home page.

- 2 In the Self-Service section, click the Forms Library link.
- 3 From the left navigation bar, select My Saved Forms.
- 4 In the Saved Forms list, select the form and click Resume.

## Accessing a Submitted Self-Service Form

Use the following procedure to access a submitted employee self-service form.

### *To access a submitted form*

- 1 Navigate to Inbox.
- 2 Click the My Submitted Items link.
- 3 In the list, select the submitted item.

You can check the status and approval history for items from this view. You can also access a summary of the form you completed.

**NOTE:** To see the entire form, including your answers to questions, navigate to the My Finished Forms view within the Forms Library.

# 13 Setting Up Siebel Projects for ERM

Siebel Projects is a Siebel module that provides a shared company workspace that employees within an organization can use to organize, coordinate, and manage formal and ad-hoc project assignments with other employees, regardless of physical location. Employees, managers, and executives can collaborate to create, staff, manage, calibrate, and achieve overall company objectives.

This chapter describes setting up and managing the features in the Siebel Projects module. It includes the following topics:

- [Project Collaboration Management on page 175](#)
- [Scenario for Siebel Projects on page 176](#)
- [Process of Setting Up Siebel Projects on page 177](#)
- [Project Activity Templates and Activities on page 178](#)
- [Virtual Collaboration and the Project Center on page 178](#)
- [Project Summary and Project Center Pages on page 179](#)
- [Browsing Projects \(End User\) on page 180](#)
- [Creating Projects \(End User\) on page 181](#)
- [Adding Project Team Members \(End User\) on page 181](#)
- [Creating a Project Activity Plan \(End User\) on page 182](#)
- [Adding a Description to the Project Summary \(End User\) on page 182](#)
- [Updating and Tracking Project Information \(End User\) on page 183](#)
- [Adding Graphics to Project Summary Pages \(End User\) on page 183](#)
- [Adding News Content to a Project \(End User\) on page 184](#)

## Project Collaboration Management

Siebel Projects centralizes key project information including membership, project schedules and milestones, activity assignments, and delivery dates, project commentary and notes, and the most current project presentations, business models, competitive reports, emails, and marketing collateral.

Siebel Projects includes the following features:

- Shared workspace and file storage
- Project summary pages
- Project KPIs
- Threaded discussions

- Shared project calendar
- Project member availability scheduling
- Attribute-based project staffing
- Access control
- Syndicated news content
- Time and expense report integration
- Virtual meeting and instant messaging integration
- Activity delegation and alerts
- Project activity charts
- Ad-hoc performance reviews

## Scenario for Siebel Projects

This scenario provides an example of processes performed by an administrator, a manager, and an end user. Your company may follow a different process according to its business requirements.

### Projects Administrator

A projects administrator for a software company is asked to help plan and implement his organization's new corporate marketing program. The global campaign requires the development of numerous cross-functional projects. The administrator designs an activity template that can be used by other Siebel Projects users to create individual activity plans that incorporate the activities necessary to manage the marketing campaign rollout. He assigns the template to Projects, allowing access to anyone using the Siebel Projects application. The administrator then creates a series of corresponding activities with suggested start and end dates and descriptive information. The administrator then sets up virtual collaboration and the Project Home and Project Summary pages.

The administrator launches the campaign by giving an overview presentation to the designated global project leads, using the virtual collaboration application within Siebel Projects. The administrator explains how each project moderator can create a cross-functional project plan to execute and manage the rollout for each geographic region. The administrator demonstrates that after a project is created and staffed, the project lead can develop an plan to complete the project objectives by selecting the marketing rollout activity template from the Projects screen's Activity Plan view. After it is selected, the activity template automatically displays the associated activities and completion timeframes for the campaign. Each project moderator can then assign activities to the appropriate project members.

### Project Moderator

A project moderator at a financial organization is asked to coordinate a cross-functional project to develop a series of APIs that allow the organization's software to better integrate with third-party products. The moderator requires assistance from several other groups in the organization such as Development, Product Marketing, and Global Services as well as from external contacts.



The moderator begins by browsing existing projects in the All Projects view. She selects the General Engineering project and then a subproject called Future Product Requirements. The moderator creates a new project, enters the key project details, and sets the project's delivery status and access type to convey the health of the project and visibility rights. Finally, the moderator adds a graphic to the Project Summary page to personalize the project.

After the project is created, the moderator staffs the project using employees with the appropriate skills. The moderator then accesses the Activity Plans tab and selects an activity plan template that automatically creates a series of activities and tasks for the project. She enters a few additional activities, and then assigns the activities to the project members so they can begin working the project.

## Project Member

A product marketer has been added to a project to develop a series of APIs for her organization's software project. This project is a cross-functional, global project and includes employees located in several different countries and time zones. The marketer uses Siebel Projects to pose questions, obtain answers, and share information and best practices with the projects team members.

The product marketer accesses the Project Summary page of this project and reviews key project information such as project description and objectives, key project indicators, project news, related projects, new project notes, and activities that help her to understand the project and her individual responsibilities.

# Process of Setting Up Siebel Projects

The following lists show the procedures that an administrator and manager typically perform to set up and use Siebel Projects. Your company may follow a different process according to its business requirements.

## Administrator Topics

To set up Siebel Projects, review the following topics:

- 1 [Project Activity Templates and Activities on page 178](#). For more information, see *Applications Administration Guide*.
- 2 [Virtual Collaboration and the Project Center on page 178](#). The administrator sets up virtual collaboration within Siebel ERM to allow coworkers to communicate in real time over the Web. For more information on setup, see *Siebel Portal Framework Guide*.
- 3 [Project Summary and Project Center Pages on page 179](#). Administrators use the Microsite Management feature to configure and manage the layouts for the ERM Project Home and ERM Project Summary pages. For more information on Microsite Management, see *Applications Administration Guide*.

## End-User Procedures

To use Siebel Projects, perform the following procedures:

- 1 Browsing Projects (End User) on page 180
- 2 Creating Projects (End User) on page 181
- 3 Adding Project Team Members (End User) on page 181
- 4 Creating a Project Activity Plan (End User) on page 182
- 5 Adding a Description to the Project Summary (End User) on page 182
- 6 Updating and Tracking Project Information (End User) on page 183
- 7 Adding Graphics to Project Summary Pages (End User) on page 183
- 8 Adding News Content to a Project (End User) on page 184

## Project Activity Templates and Activities

You can create activity templates that provide the framework that is used to complete multistep tasks for your projects using the Application Administration screen's Activity Templates and Activity Template Details views. Typically, the administrator sets up the activity templates, and the end users apply the predefined templates to create their activity plans. For a project-related activity type, you might choose Project - Design, Project - Deployment, or Project - Management.

For more information about setting up activity templates with associated activities, see *Applications Administration Guide*.

### Related Topic

[Process of Setting Up Siebel Projects on page 177](#)

## Virtual Collaboration and the Project Center

Integrating synchronous, real-time collaboration applications into the Project Center page allows project users to collaborate with each another in real time over the Internet or your organization's intranet. Integrated applications can include third-party applications or another Siebel application such as Call Center.

The Project Center page incorporates a collaboration section which includes a set of predefined virtual collaboration views. When these views are set up, the user is automatically logged into the virtual collaboration application.

During virtual collaboration setup, portal agents retrieve data by sending HTTP requests to external applications. The HTML results appear in the Siebel application or in a Siebel Web page.

Portal agents are administered using the Integration Administration screen and associated views. These views allow you to define the external host, the ways that links should be handled and to specify the HTTP request that is sent to the external host.

For more information on setting up portal agents, see *Siebel Portal Framework Guide*.

## Process Guidelines for Setting Up Virtual Collaboration

Use the following process guideline to set up virtual collaboration in Siebel ERM:

- **Define content fixup.** Links that appear in third-party Web applications may be inappropriately configured for display in another application, such as your Siebel application. For example, the links in an instant-messaging application may be defined as relative links. If you include these links in the Project Center page the links do not work. The Fixup Administration view allows you to define how links embedded within external HTML content should be rendered in the Siebel user interface. Your Siebel application is preconfigured with several fixup types, however, you can define a new one for your needs.
- **Define the external host.** You define the external data hosts in the Host Administration view. Defining the external host allows you to also create symbolic URLs to reference the external host, such as SSO Server, rather than typing in the specific host information. This is useful because you can have multiple symbolic URLs that reference the same external data host. If the external host information changes, you only need to change the server location in the Host Administration view rather than edit each symbolic URL. This view allows you to:
  - Maintain external host names in a single place
  - Specify NCSA Basic authentication credentials
  - Define how links should be handled (fixed-up) after external HTML content is rendered
- **Define Web applications.** Web applications allow multiple Symbolic URLs to send requests to the same Web application and share the same session. This is useful if you have two different applet controls that use Symbolic URLs to submit requests to the same Web application. You can associate these Symbolic URLs to a single Web application and define whether sharing occurs during the same session.
- **Define Symbolic URLs.** You use the Symbolic URL Administration view to specify how the HTTP request to the external application is constructed and to define any arguments and values to be sent as part of the request.
- **Define Symbolic URL Arguments.** Symbolic URL Arguments allow you to configure portal agents in several ways. You use symbolic URL arguments to define data that is sent to an external host and to submit commands to SWE that affect the behavior of portal agents.

### Related Topic

[Process of Setting Up Siebel Projects on page 177](#)

## Project Summary and Project Center Pages

The Siebel Projects module includes two preconfigured project pages, Project Home and Project Summary, that include information relevant to employees' projects. Administrators use the Microsite Management feature to configure and manage the layouts for these pages, adding links to other Siebel applications, other Siebel portal pages, or important messages. For more information on managing the content and layout for the Siebel project pages, see *Applications Administration Guide*.

## Project Home Page

The Siebel Project home page (the Project Center page) provides employees, managers, and executives with an overview of their projects, highlighting key project information such as delivery status, and new activities that have been assigned to them across all their projects. The Siebel Projects home page also acts as a platform for integrating real-time collaboration technologies, such as online meetings and presentation capabilities or instant messaging and conferencing services.

When your organization subscribes to Siebel Content Services, you can access Siebel application-hosted data to personalize the delivery of external news content to the Siebel project pages. Siebel application-hosted data consists of company profiles, corporation relationship information, premium external news feeds, and productivity content from content producers and providers. For more information on setting up external news content, see [Chapter 10, “Setting Up Content Services.”](#)

## Project Summary Page

The Siebel Project summary page provides employees with a summary view of events occurring within a particular project. The project summary page provides specific performance indicators, as well as a forum for conveying project objectives, highlighting required actions, delivering information, and providing relevant third-party news.

### Related Topic

[Process of Setting Up Siebel Projects on page 177](#)

# Browsing Projects (End User)

You can browse projects using the All Projects list, or the Project Center. In addition to listing the user's personal projects, the Project Center allows the user to organize and view existing projects as well as schedule and join meetings, participate in collaborative sessions, schedule conference calls and interact with team members using instant message.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

### *To browse all projects*

- 1 From the Site Map, navigate to Projects > All Projects.
- 2 In the Projects list, query for the desired project.

### *To browse projects using the Project Center*

- 1 From the Home Page, click the Projects link.
- 2 From the Project Center, click the project link in the My Projects list.
- 3 From the Project Summary screen, view project details.

## Creating Projects (End User)

Use the following procedure to create a new project. Only administrators and users with appropriate responsibilities can modify and delete projects.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

### *To create a new project*

1 Navigate to the Projects screen.

2 In the Projects list, add a new record and complete the necessary fields.

Some fields, such as Project # and Created Date, are automatically completed. Other fields, such as Status and Access, contain default values.

- In the Access Type field, select Public or Public Read-Only to make the project visible to project team members.
- In the Status field, choose Active to launch the project.
- In the Delivery field, choose an indicator for the project progress.

**NOTE:** Projects are deleted using the Administration - Data screen. For more information, see *Applications Administration Guide*.

## Adding Project Team Members (End User)

Use the Members view to add team members to the project. The default and primary member of the team is the project creator. Only administrators and users with the appropriate responsibilities can modify or delete project teams.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

### *To add project members*

1 Navigate to the Projects screen.

2 In the Projects list, select the project, and click the link in the Name field.

3 Click the Members view tab, and in the Members list, click New.

4 From the Add Employees dialog box, select team members, and then click OK.

5 In the members list, select the primary member of the team, and then click the check box in the Primary field.

6 Save the record.

## Creating a Project Activity Plan (End User)

When you select an activity plan template using the Activity Plans view, the template's corresponding activities automatically appear in the Activities view.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

### *To create an activity plan with activities*

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project, and then click the link in the Name field.
- 3 Click the Activity Plans view tab, and in the Activity Plans list, create a new record.  
The Planned Start field is automatically populated with a default date and time. You can change these values if desired.
- 4 In the Template field, select the activity template, and save the record.  
To appear in the template list, the activity template type must be set to project. For more information, see ["Project Activity Templates and Activities" on page 178](#).

### *To add an activity to the activity plan*

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project, and then click the link in the Name field.
- 3 Click the Activity Plans view tab, and in the Activity Plans list, select the Activity Plan.
- 4 In the Activities list, click new, and complete the fields for the new activity.

## Adding a Description to the Project Summary (End User)

Employees with the appropriate responsibilities can add a project description to the Project Summary page. The project description appears in the following locations:

- **Project Home Page.** The first 100 characters used in the project description appear under the project's link on Project Home page. Any additional text formatting that is applied to your text appears.
- **Project Summary Page.** The full project description appears on the Project Summary page.
- **Related Projects Section.** When the project is associated with another project, the first 50 characters used in the description appear in the Related Projects section on the Project Summary page.
- **Project Description Field.** The full project description appears in the Project form in the View Detail.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

### ***To add a project description***

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project, and then click the link in the Name field.
- 3 Click the More Info view tab, and in the Description form, add text.

**NOTE:** When you click in the Description field, the integrated HTML editor toolbar appears at the bottom of the field. The toolbar provides special editing controls, which allow you to use supported HTML formatting and also provide some standard editing features such as cut and paste. For more information about using the HTML editor, see *Fundamentals*.

- 4 When finished, click the View Summary button.

The description appear in the Project Summary page.

## **Updating and Tracking Project Information (End User)**

Use the Project Summary and Project Center pages, and other views such as Notes, and Tasks to review progress, and update project status, information, and initiatives.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

### ***To add or view project information***

- 1 Navigate to the Projects screen, and in the Projects list, select the project.
- 2 In the project record, click the link in the Name field, and perform any of the following actions:
  - Click the appropriate view tab to add or view information about the project.
  - From the More Info form, click View Summary to display the Project Summary view, and then from the summary view, click View Details to add information.
  - Click the Projects global link to open the Project Center, then click the links in the Project Center layout to navigate to relevant views.

## **Adding Graphics to Project Summary Pages (End User)**

Administrators and end users with the appropriate responsibilities can add a graphic image to the Project Summary page.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

***To add a project graphic***

- 1 Navigate to the Projects screen.
- 2 In the Projects list, select the project, and click the link in the Name field.
- 3 Click the More Info view tab, and in the Project form, click the select button in the Project Summary Graphic field.
- 4 In the Image Attachments dialog box, click New.
- 5 In the Attachment Name field, click the select button, navigate to the image, and then click Add.  
The image name appears in the Attachment Name field. You can edit the image name to give it a descriptive label.
- 6 Click Save.  
The image name appears as a record in the Image Attachments dialog box.
- 7 In the Primary field, select the check box, and then click OK.
- 8 In the Project form, click View Summary to review the image on the Project Summary page.

## Adding News Content to a Project (End User)

Siebel ERM applications are already integrated with Siebel Content Services, an online news and information subscription service that accesses information from several industry news services. When your organization subscribes to Siebel Content Services, you can personalize the delivery of external news content to specific sections within your project pages.

### Creating a News Topic

You can use Content Services to create news topics, which are records that specify the search criteria used to find current news on topics relevant to your project. For more information about creating a news topic, see [Chapter 10, "Setting Up Content Services."](#)

### Adding a News Topic

After the appropriate news topics are created, you can add the news topics to your project. Siebel Projects application uses the news topics you add to the project to retrieve relevant news stories and include the links in the Project News section on your Project Summary page.

This task is a step in [Process of Setting Up Siebel Projects on page 177](#).

***To add a news topic to a project***

- 1 Navigate to the Project Summary page of the project to which you want to add a news topic.
- 2 If the Project News section does not appear in your Project Summary page, add it to the Project Summary layout.



- a Click Edit Layout.
- b In the Project Summary Layout view, click the show button in the Project News section.
- c Click Done.

The Project Summary page appears with the Project News section.

- 3 In the Project Summary page, click View Details.

The Project form appears.

- 4 Click the More Info view tab, and in the Project form, click the select button in the Project News field.
- 5 In the Related News Topics dialog box, click New to add a news topic.

**NOTE:** You can also remove exiting topics from your Project Summary page by selecting the topic, and clicking Delete.

- 6 In the Add News Topics dialog box, query to find the news topic you want to add, and then click Add.
- 7 Click OK to add the news topic to the Related News Topics dialog box.
- 8 When finished, click the View Summary button.

The selected news topics appear in the Project News section.



# 14 Setting Up an Application Services Interface

Siebel ERM includes an Application Services Interface (ASI) that help an organization to integrate and synchronize employee and position data between Siebel ERM and other Human Resources Management Systems (HRMS), such as Oracle HR, PeopleSoft HR, and SAP HR. Each system maintains a separate database.

This chapter describes how to set up an ASI, and synchronize the data. It includes the following topics:

- [Process for Setting Up an Application Services Interface on page 187](#)
- [Configuring Web Services on page 187](#)
- [Activating the Employee ASI Workflow on page 188](#)
- [Synchronizing ERM and Third-Party Employee Data on page 189](#)

## Process for Setting Up an Application Services Interface

The following list shows the procedures that administrators typically perform to set up a third-party Human Resources Management System for use with Siebel ERM Applications Services Interface. Your company may follow a different process according to its business requirements.

### Administrator Procedures

To set up an ASI, perform the following procedures:

- 1 [Configuring Web Services on page 187.](#)
- 2 [Activating the Employee ASI Workflow on page 188.](#)
- 3 [Synchronizing ERM and Third-Party Employee Data on page 189.](#)

## Configuring Web Services

Web services are used to direct the inbound and outbound messages to and from the third-party HRMS. Verify that the Web service is correctly configured for each employee.

This task is a step in [Process for Setting Up an Application Services Interface on page 187.](#)

### *To configure the Web services for position and an employee*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Web Services > Outbound Web Services.**

- 2 In the Outbound Web Services list, query to find the External Employee service.
  - External Position
  - External Employee
- 3 Verify that the fields in the Outbound Web Services list match the information in the following table.

Namespace	Name	Status
http://siebel.com/asi/	External Position or External Employee	Active

- 4 In the Service Ports list, add a new record, and then complete the fields.

The following table describes the fields in the service port record.

Field	Comments
Address	When you select a transport, the field is populated with a template address. For example, C:\Employee_req.xml;C:\Employee_resp.xml. (The root of the address can be different depending on your environment.) The address path can be any file system accessible through the Siebel client.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC.
Name	Enter a descriptive name for the port.
Port Type	Enter External Position or External Employee.
Transport	Select File from the drop-down list.

For more information about configuring Web Services and setting up demonstration scripts, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.

## Activating the Employee ASI Workflow

The Synchronize Employee ASI workflow must be active for synchronization to occur. For more information on business processes and activating workflows, see *Siebel Business Process Designer Administration Guide*.

This task is a step in [Process for Setting Up an Application Services Interface on page 187](#).

### ***To activate the workflow for position and an employee***

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Business Process > Workflow Deployment > Repository Workflow Processes.
- 2 In the Workflow Processes list, query to find the Synchronize Position ASI workflow.

- 3 Click Activate to initialize the Synchronize Position ASI workflow.

**NOTE:** After you have activated the workflow for position and employee data, restart your server.

## Synchronizing ERM and Third-Party Employee Data

After ASI setup is completed, you can synchronize ERM data files with employee data from a third-party Human Resources Management system (HRMS).

This task is a step in [Process for Setting Up an Application Services Interface on page 187](#).

### *To synchronize employee data with a third-party application*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - User > Employees.

- 2 In the Employee list, query to find the record you want to update.

You can edit the record before you update the external system. The changes you make are updated in both systems after synchronization.

- 3 Click the menu button and choose Update External System.

**TIP:** Choose Update All to External System if you have made changes to several records. Update All synchronizes the changes on multiple records at one time. Depending on the profile of the user and the expected system load, administrators can restrict access to Update All External Systems by controlling the visibility on the menu option.

## Synchronizing Position Data

As an administrator, you can synchronize position data with your HRMS.

### *To synchronize position data with a third-party application*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group > Positions.

- 2 Using the Explorer and the Position list, locate the record and update the information.

**NOTE:** You can edit some fields in the record before you synchronize. The changes you make are updated in both systems.

- 3 In the Position Entry form, click the menu button and then choose Update External System.



# 15 Employee Self-Service Reference

This appendix includes information and sample scripts used to administer Oracle's Siebel Employee Self-Service. It includes the following topics:

- [Example eScript for Requestor Form on page 191](#)
- [Example eScript for Summary Form on page 192](#)

## Example eScript for Requestor Form

The following script is used to link an employee self-service business process to the Inbox. In this example, the script is linked to the approval type called PAFChange.

```
function Script_Finish ()
{
    var szScriptSessionId;
    var szRequester;
    var svc;
    var indata;
    var outdata;

    // Cancel saving everything to the database
    Cancel ();

    indata = TheApplication ().NewPropertySet ();
    outdata = TheApplication ().NewPropertySet ();

    // Get the login name of the user
    szRequester = TheApplication ().LoginName ();

    // Get SmartScript Save Session table Id.
    szScriptSessionId = GetSessionId ();

    // ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
    // required input arguments for the "Universal Inbox.Initialize"
    indata.SetProperty ("ItemObjectId", szScriptSessionId);

    // Item Type is the Approvals Inbox type defined in the
    // Approvals Inbox Administration screen
    indata.SetProperty ("ItemType", "PAFChange");

    // Short Description of the inbox item
    indata.SetProperty ("ItemDescription", szScriptSessionId);
}
```

```

    indata.SetProperty ("ItemSubmittedBy", szRequester);
// ItemQueueDuration, ItemPriority, and ItemComments are the
// optional input arguments for the "Universal Inbox.Initialize"
indata.SetProperty ("ItemQueueDuration", "129600");
indata.SetProperty ("ItemPriority", "High");
indata.SetProperty ("ItemComments", "Comments from Employee Self-Service");
svc = TheApplication ().GetService ("Universal Inbox");
svc.InvokeMethod("Initialize", indata, outdata);
}

```

## Example eScript for Summary Form

The following script is used by summary forms.

```

function Script_Open ()
{
    var PageFirstPage;
    var QuestLastName;
    var szLastName = "";
    var szScriptSessionId = "";
    var boCallScripts;
    var bcCSRRunAnswer;

// Get the handles to the page and the questions
    PageFirstPage = GetPage ("PAF Summary");
    QuestLastName = PageFirstPage.GetQuestion ("PAF Summary Employee Last Name");
// Set all the questions read-only
    QuestLastName.SetQuestionEnable (false);
// Get the script session run id
    szScriptSessionId = GetParameter ("Session.ScriptSessionId");
// Get the "Call Scripts" busobj and "Call Script Run Answers" buscomp
    boCallScripts = TheApplication().GetBusObject ("Call Scripts");
    bcCSRRunAnswer = boCallScripts.GetBusComp("Call Script Run Answers");
// Query for the employee's last name
    with (bcCSRRunAnswer)
    {
        SetViewMode (AllView);
        ClearToQuery ();
        ActivateField ("Run Id");
    }
}

```



```

ActivateField ("Page Name");
ActivateField ("Question Name" );
ActivateField ("Answer Text" );
SetSearchSpec ("Run Id", szScriptSessionId);
SetSearchSpec ("Page Name", "PAF Which Change");
SetSearchSpec ("Question Name", "Display Employee Last Name");
ExecuteQuery (ForwardOnly);
if (FirstRecord () != 0)
    szLastName = GetFieldValue ("Answer Text");
}
bcCSRunAnswer = null;
boCallScripts = null;
// Set the values of each question by the scripting
QuestLastName.SetCurrentValue (szLastName);
return;
}

```



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