SIEBEL® *e*BUSINESS APPLICATIONS

SIEBEL SOLUTION ADMINISTRATION GUIDE

SIEBEL 2000

VERSION 6.1

10PA1-S000-06100

JUNE 2000

Siebel Systems, Inc., 1855 South Grant St., San Mateo, CA 94402

Contents

Introduction

Who Should Use This Guide

This guide describes how to implement the Solution feature in your Siebel application. Specifically, it discusses the Solution Administration screen and its views.

The audience for this guide consists of:

Call Center Administrators	Persons responsible for setting up and maintaining a call center; duties include designing and managing Computer Telephony Integration, SmartScripts, and message broadcasts. These persons may also be responsible for customer satisfaction, response times, and accuracy of the information provided to customers.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel products.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality. A developer is typically someone from the Information Services department.
Configurators	Persons responsible for planning, implementing, and configuring Siebel applications. A configurator is typically a consultant or someone from the Information Systems department.
Knowledge Engineers	Persons responsible for maintaining a database of information about their company.

To effectively implement Solutions, you should be familiar with the requirements of a customer service center.

How This Guide Is Organized

This guide provides information necessary to implement, configure, and monitor Solutions in your Siebel applications, with particular detail provided for both application and client/server administration.

NOTE: Your Siebel implementation may not have all the features described in this guide, depending on which software modules you have purchased.

Additional Documentation

The following documentation also provides information on the topics addressed in this guide.

Siebel Basics

Siebel Release Notes and *Siebel System Requirements and Supported Platforms*

Using Siebel Applications

Siebel Applications Administration Guide

This guide does not provide information about general software concepts, such as records and queries, or about using Windows. Neither does it provide instructions for basic navigation of Siebel applications. For this kind of information about Siebel applications, refer to *Siebel Basics*.

Administrators and developers, such as marketing administrators, call center administrators, and application developers, should also read the *Siebel Applications Administration Guide* for information on how to set up and maintain Siebel applications features.

The document *Using Siebel Applications* describes how an end-user would take advantage of the Solutions feature.

You will find information about Siebel Technical and Professional Services in the *Guide to Siebel Global Services*.

For copies of these documents, please use Siebel Books Online, accessible via the Worldwide Services tab on the Siebel Systems Web site (www.siebel.com). Through Siebel Books Online, you can order additional Siebel documentation and copies of the *Siebel Bookshelf for Siebel eBusiness Applications* CD-ROM.

Another source of information is the *Siebel Online Help*.

Contacting Siebel Technical Support

Do you know how to access Siebel Technical Support? It is crucial that you understand the requirements for getting support. This will ensure the best experience possible. If you have questions, please don't hesitate to contact us.

To maximize your knowledge of Siebel products and your return on investment:

- You must attend Siebel training to become a "designated contact."
- Your trained designated contacts provide technical support to your users. Siebel Technical Support provides support directly to your "designated contacts" only.

To provide efficient and timely support, and to empower you in the process:

- Siebel Technical Support is primarily Web-based, accessed via Siebel SupportWeb (http://supportweb.siebel.com). Please submit new service requests to us through SupportWeb, where you can also search the knowledge base for solutions.
- Designated contacts receive read/write access to SupportWeb. All other project team members at your company receive a read-only account to ensure they can reap the benefits of the support knowledge base.

To register for Siebel training, please access http://www.siebel.com/education/ and choose Siebel Customer Technical Education. Questions on the above can be directed to Siebel Technical Support at:

eBusiness Customers:	support@siebel.com
MidMarket Edition Customers:	swasupport@siebel.com or:

Americas: eBusiness: 800.214.0400 or 650.295.5724 MidMarket: 800.354.1571

London:	+44.1784.494.949	Tokyo:	0120.606.750 (Japan domestic only), +81.3.5469.3811 (Outside of Japan)
Munich:	+49.89.95718.400	Singapore:	+65.320.8533 (main number)

Please submit technical issues and updates to Siebel SupportWeb (http://supportweb.siebel.com). If you do not have a SupportWeb account, please email us at the relevant email address above. We appreciate your business and look forward to working with you to ensure 100% customer satisfaction.

Siebel Welcomes Your Comments

To help us with future versions, we want to know about any corrections or clarifications that you would find useful. Please include in your message:

- The title and version of this guide
- Your name, company name, job title or functional area, phone number, and email address

Write to us via regular mail or email at:

Siebel Systems, Inc.
Technical Publications Department
1855 South Grant Street
San Mateo, CA 94402-2667

doc@siebel.com

We appreciate your feedback.

Solution Administration 1

About Siebel Solutions

Customer service organizations estimate that approximately 85 percent of incoming service requests have been previously resolved by other customer service representatives. To minimize costs and maximize the operational effectiveness of a call center, an organization can reuse the solutions for previously resolved problems.

Siebel solutions allow you to store, organize, associate, and search the knowledge base for resolutions successfully used for similar problems or even published solutions for potential problems.

After a problem is successfully resolved, you can associate the solution with the service request for reference in case the service request is reopened by the customer at a later date. Recording the solution also makes it possible for you to resolve similar service requests without doing extensive research. You can find an existing service request, solution, or resolution document that may provide information relevant for the current service request or product defect under investigation. You can quickly review the information and, to the extent that it is relevant, associate it with the current service request or product defect.

Setting Up Solutions

Solutions are set up in a variety of views.

Table 1-1 describes the tasks involved in creating and accessing solutions and gives the views you can use to perform these tasks.

Table 1-1. Tasks and Views for Setting Up Solutions

Task	View (Accessed from the Screens Menu)
Creating solutions	Solution Administration → Solutions → Solutions
Associating solutions with a resolution document	Solution Administration → Resolution Documents
Associating resolution documents with a solution	Solution Administration → Solutions → Resolution Documents
Associating solutions with each other	Solution Administration → Solutions → Related Solutions
Viewing service requests and product defects	Solution Administration → Solutions → Service Requests and Product Defects
Publishing a solution internally	Solution Administration → Solutions → Resolution Documents Solution Administration → Solutions → Related Solutions Solution Administration → Solutions → Service Requests and Product Defects Solution Administration → Solutions → Solutions Solution Administration → Solutions → All Solutions
Publishing a solution externally	Solution Administration → Solutions → Resolution Documents Solution Administration → Solutions → Related Solutions Solution Administration → Solutions → Service Requests and Product Defects Solution Administration → Solutions → Solutions Solution Administration → Solutions → All Solutions

Adding, Modifying, and Deleting Solutions

The Solutions Administration view enables you to create, modify, and delete solutions.

To add a solution

1. Choose Screens → Solution Administration → Solutions → Solutions.

   The Solutions Administration view appears.

2. Choose Edit → Add New Record.

   A row is added to the list.

3. Complete the fields; some fields are described in Table 1-2.

Table 1-2. Selected Fields in the Solutions Administration View

Field	Comments
FAQ	Frequently asked questions about the particular problem listed in the Name field.
Name	Required. The name of the problem in the service request.
Publish External	Check the box if you wish to publish information for external users.
Publish Internal	Check the box if you wish to publish information for internal users.
Related Solution	Solutions related to this service request.
Solution	The solution to the problem in the service request.
Status	The current status of the solution.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

Associating Resolution Documents with a Solution

The Solution Resolution Documents Administration view, shown in Figure 1-1, displays all solution records and is used to associate resolution documents with solutions.

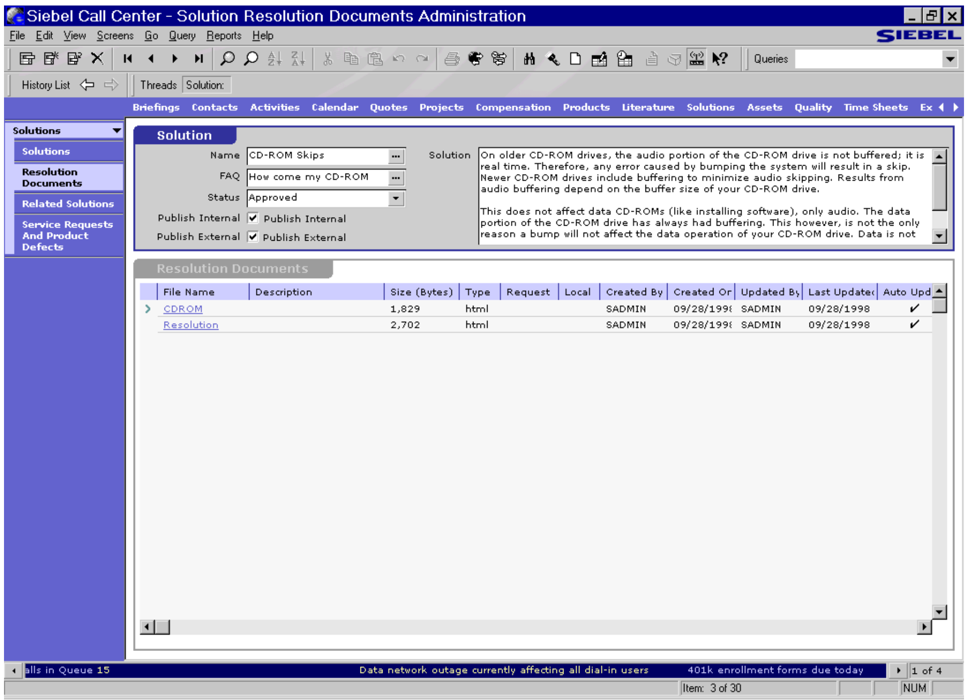

Figure 1-1. Solution Resolution Documents Administration View

Table 1-3 displays the fields in the Resolution Documents list applet of the Solution Resolution Documents Administration view. Only the Description field is editable.

Table 1-3. Fields in the Resolution Documents List Applet in the Solution Resolution Documents Administration View

Field	Comments
Auto Update	If the box is checked, this indicates that update documentation is automatically received. Read-only.
Created By	The person who created the resolution document.
Created On	The date and time the resolution document was created.
Description	The description of the resolution document.
File Name	The file name for the resolution document.
Last Updated	The date when the file was last updated.
Publish External	Check the box if you wish to publish information for external users.
Publish Internal	Check the box if you wish to publish information for internal users.
Size (Bytes)	Size of the file.
Type	The type of file (for example, HTML, .def).
Updated By	The person who updated the resolution document.

To add a resolution document to a solution

1. Choose Screens → Solution Administration → Solutions → Resolution Documents.

   The Solution Resolution Documents Administration view appears.

2. If necessary, query the Solution form applet to find the solution to which you want to add a resolution document.

3. Select the Resolution Documents applet, and use one of the following methods to add a resolution document:

   - Choose Edit → Insert Record to add an empty row to the list, select a resolution document in the Select File dialog box, and then complete the fields, some of which are shown in Table 1-3 on page 1-6.

     NOTE: Choose this method only if you know that the resolution document does not exist as a resolution document already.

   - Choose Edit → Add New Record, select records from the Add Resolution Document dialog box, and then click Add. (Clicking New inserts an empty row.)

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

Associating Solutions with a Resolution Document

The Resolution Document Administration view, shown in Figure 1-2, displays all resolution documents and is used to associate solutions with resolution documents.

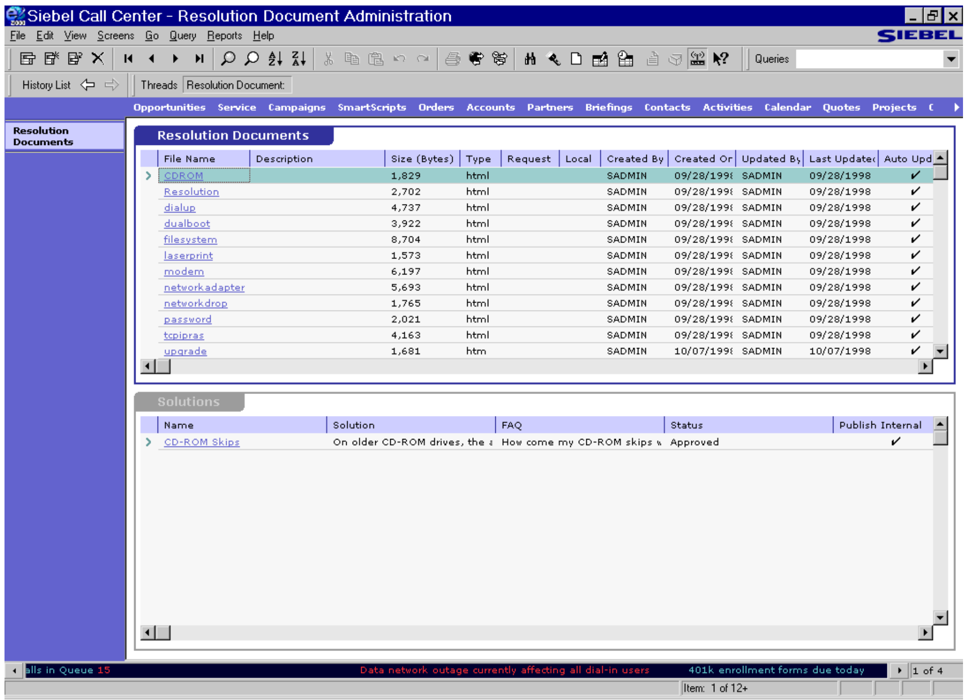

Figure 1-2. Resolution Document Administration View

To add a solution to a resolution document

1 Choose Screens → Solution Administration → Resolution Documents.

The Resolution Document Administration view appears.

2 If necessary, query the Resolution Document form applet to find the resolution document to which you want to add a solution.

3 Select the Solutions applet, and use one of the following methods to add a solution:

- Choose Edit → Insert Record to add an empty row to the list, enter a solution name in the Name field, and then complete the fields, some of which are shown in Table 1-2 on page 1-4.
- Choose Edit → Add New Record, select records from the Solutions dialog box, and then click Add. (Clicking New inserts an empty row.)

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

Associating Solutions with Each Other

The Solution Related Solutions Administration view, shown in Figure 1-3, displays a solution in the Solution form applet—and solutions related to that solution in the Related Solutions list applet.

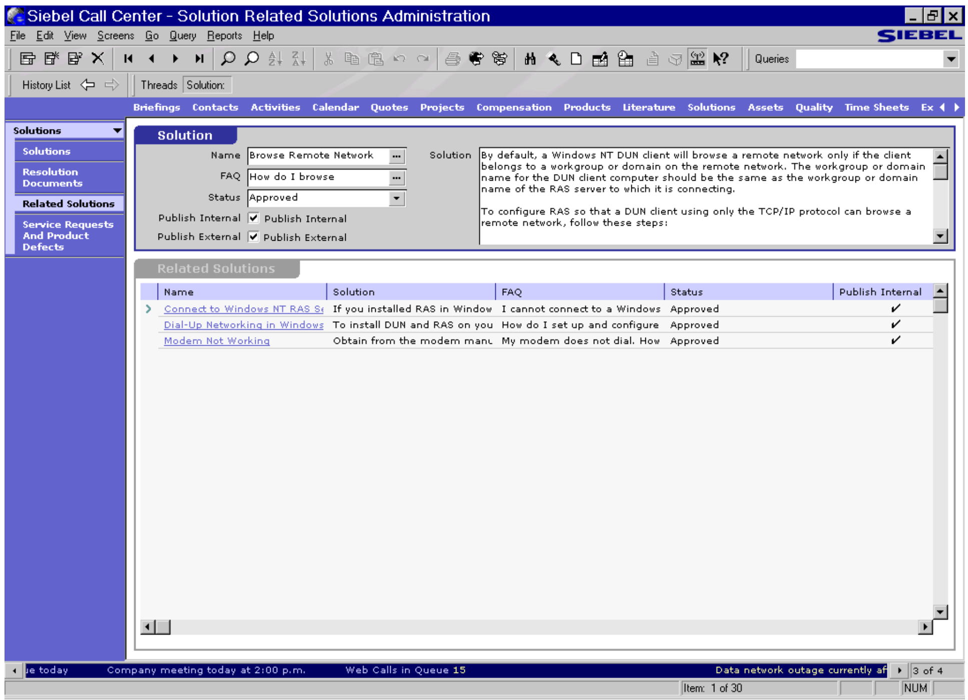

Figure 1-3. Solution Related Solutions Administration View

To associate solutions with each other

1. Choose Screens → Solution Administration → Solutions → Related Solutions.

   The Solution Related Solutions Administration view appears.

2. If necessary, query the Solution form applet to find the solution to which you want to add a resolution document.

3. In the Related Solutions list applet, select Edit → Add New Record.

   The Solutions dialog box appears.

4. Select a solution from the Solutions dialog box and click Add.

   This choice will be added to the Related Solutions list applet.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

Associating Service Requests and Product Defects

The Solution Service Requests and Product Defects Administration view displays all solution records. For each solution shown in the Solution form applet, the view displays all the service requests and product defects associated with that solution.

To associate a service request with a solution

1. Choose Screens → Solution Administration → Solutions → Solutions and select any existing solution from the Solution Administration view.
2. Click Solutions Service Requests and Product Defects on the view bar.
3. Select the Service Requests list applet, and use one of the following methods to add a service request:
   - Choose Edit → Insert Record, to add an empty row to the list, and then complete the fields, some of which are shown in Table 1-4.

     NOTE: Choose this method only if you know that the service request does not exist already.

   - Choose Edit → Add New Record, select records from the Add Service Requests dialog box, and then click Add. (Clicking New inserts an empty row.)

Table 1-4. Selected Fields in the Service Requests Applet (Sheet 1 of 2)

Field	Comments
Abstract	A short description of the service request problem.
Account Site	Read-only. The location for the account.
Commit Time	This field shows the date and time within which a service request must be resolved.
Contact Account	The contact’s account name.
Created By	The person who created the service request. Read-only.
Customer Ref Number	Read-only.
Date Modified	Read-only.

Table 1-4. Selected Fields in the Service Requests Applet (Sheet 2 of 2)

Field	Comments
Date Opened	The date that the service request was opened. Read-only.
Group	The divisions in your Siebel application, with the type of Service. For information on setting up divisions, see the *Siebel Applications Administration Guide*.
Owner	The owner of the service request.
Priority	A ranking to help you prioritize service requests internally.
Severity	The severity of the service request and impact on the customer.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

For more information about Service Requests, see the *Siebel Field Service Guide* and *Using Siebel Applications*.

To associate a product defect with a solution

1. Choose Screens → Solution Administration → Solutions → Solutions and select any existing solution from the Solution Administration view.
2. Click Solutions Service Requests and Product Defects on the view bar.

3 Select the Product Defects list applet, and use one of the following methods to add a product defect:

- Choose Edit → Insert Record, to add an empty row to the list, and then complete the fields, some of which are shown in Table 1-5.

  NOTE: Choose this method only if you know that the product defect does not exist already.

- Choose Edit → Add New Record, select records from the Add Product Defects dialog box, and then click Add. (Clicking New inserts an empty row.)

Table 1-5. Selected Fields in Product Defects Applet

Field	Comments
Cause	The cause of the product defect.
Defect Number	The product defect number.
Extended Description	Description of the product defect.
Group	The group in which the product defect was found.
Owner	The owner of the product with the defect.
Priority	A ranking that helps you prioritize service requests and defects internally.
Product	The product that has the defect.
Reported By	The person who reported the product defect.
Severity	The severity of the product defect in terms of its impact on the customer.
Type	The type of defect.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

For more information about Product Defects, see the *Siebel Field Service Guide* and *Using Siebel Applications*.

Index

P

R

S