



# Siebel HelpDesk Guide

Version 7.8, Rev. A  
November 2009

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# 1

## What's New in This Release

### What's New in Siebel HelpDesk Guide, Version 7.8, Rev. A

This guide has been updated to reflect product name changes.

### What's New in Siebel HelpDesk Guide, Version 7.8

[Table 1](#) lists changes in this version of the documentation to support release 7.8 of the software.

Table 1. New Product Features in Siebel HelpDesk Guide, Version 7.8

Topic	Description
Entire book	This is a new book.  Some of the topics in this book were previously in Siebel Employee Relationship Management Guide.
Enabling SmartIssue  See <a href="#">"Using Siebel Automated Service" on page 21.</a>	Added a task describing how to enable SmartIssue.
Enabling Service Level Management  See <a href="#">"Enabling Service Level Management" on page 23.</a>	Added procedures and tasks describing how to enable and set up Service Level Management.
Setting up Service Request home page links  See <a href="#">"Setting Up Links on the Service Request Home Page" on page 24.</a>	Added procedure on how to set up links on the Service Request home page that correspond to the four main types of Service Requests—Incidents, Problems, Known Errors, and Requests for Change.

Table 1. New Product Features in Siebel HelpDesk Guide, Version 7.8

Topic	Description
<p>IT Service Management Solution Set</p> <p>See <a href="#">"IT Service Management Solution Set" on page 27.</a></p>	<p>Added procedures and tasks related to the IT Service Management set as follows:</p> <ul style="list-style-type: none"> <li>■ <b>Incident Management.</b> Incident Management automates the process of reporting and tracking an incident or groups of incidents.</li> <li>■ <b>Problem Management.</b> Problem Management addresses the root cause of incidents and then initiates actions to improve or correct the situation. Problem Management includes notification, root cause analysis, and impact analysis.</li> <li>■ <b>Change Management.</b> Change Management or a request for change is a formal way to request a change within the overall IT infrastructure or system.</li> <li>■ <b>Known Errors.</b> An error is identified when a problem is detected. The error becomes a known error when the root cause of the problem is found and a workaround is provided.</li> <li>■ <b>Asset Management.</b> Asset and configuration management provides a model of the infrastructure or a service by identifying, controlling, maintaining, and verifying the versions of configuration items in existence.</li> </ul>
<p>Example of Branching Logic for Employee Self-Service</p> <p>See <a href="#">Figure 7 on page 63.</a></p>	<p>Added new example diagram of branching logic for employee self-service.</p>
<p>eScript examples</p> <p>See <a href="#">"Creating an Employee Self-Service Summary Form" on page 69.</a></p> <p>and</p> <p><a href="#">"Linking Self-Service Forms to the Inbox" on page 73.</a></p>	<p>Moved script examples so that they appear within procedures instead of having them as examples at the end of the chapter.</p>



# 2

## Getting Started

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

*Applications Administration Guide* covers the setup tasks that are common to all Siebel Business 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.

The *Siebel System 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 topics:

- [Administrator Setup Tasks on page 9](#)
- [Configuring Siebel ERM for GUESTERM User on page 10](#)

## Administrator Setup Tasks

[Table 2](#) lists and describes the administrative setup tasks that are specific to Siebel HelpDesk. The table also directs you to documentation that provides information about each task.

When setting up your application, use [Table 2](#) and refer to the other topics and guides listed for additional instructions.

Table 2. 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.
Set up Responsibilities for delegated administrators and users.	Assign users and views to preconfigured responsibilities; create new responsibilities.	<i>Applications Administration Guide</i> <a href="#">Setting Up Siebel HelpDesk Responsibilities on page 17</a>

Table 2. Administrative Setup Tasks

Administrative Task	Description	For More Information
Set up Siebel Knowledge Base and HelpDesk Solutions Database	Set up Siebel Knowledge Base and working with HelpDesk Solutions Database.	<i>Siebel SmartScript Administration Guide</i> <a href="#">Setting Up Siebel Knowledge Base for HelpDesk on page 18</a> <a href="#">Working with the HelpDesk Solutions Database on page 19</a>
Activate HelpDesk Business Processes	Verify that HelpDesk-specific workflow processes are active, and create new processes if desired.	<i>Siebel Business Process Designer Administration Guide</i>
Enable Siebel Automated Service	Enable SmartIssue for Siebel Automated Service.	<a href="#">Using Siebel Automated Service on page 21</a>
Enable Service Level Management	Enable Service Level Management.	<a href="#">Enabling Service Level Management on page 23</a>
Configure HelpDesk for the GUESTERM user	Configure this user ID to make sure that each user logging in to the Siebel application sees the proper Home Page with the correct page tab.	<a href="#">Configuring Siebel ERM for GUESTERM User on page 10</a>

## 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-OCI 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.

- 7 Restart the Web server.



# 3

## 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. Employees can also use employee self-service features such as Assets Online to get help and information.

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 13](#)
- [Siebel HelpDesk Administrator Resources on page 14](#)
- [Scenario for Siebel HelpDesk on page 16](#)
- [Process of Setting Up Siebel HelpDesk on page 17](#)

### 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 administrators can configure rules for each subarea. 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, because 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 can assist 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 security tokens) to each employee, add products and make them 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 Business 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 Business Applications*.

## Email Notification for Email Response

Using Siebel Workflow, you can define business rules that automate your business processes and procedures. For example, you may want to send email notifications to employees when the status of their service requests have changed. For detailed information on setting up email notification, see *Siebel eService Administration Guide*.

For information on setting up Siebel Email Response, see *Siebel Email Response 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 for recommendations on ways to refine accuracy for Siebel Smart Answer.

For information on setup and implementation of Siebel Smart Answer, see *Siebel Email Response Administration Guide*.

## Assignment Manager

Siebel Assignment Manager allows sales, service, and marketing organizations to assign the most qualified people to specific tasks. Assignment Manager accomplishes this function by matching candidates (that is, employees, positions, and organizations) to predefined and user-configurable assignment objects. To assign the most qualified candidate to each object, Assignment Manager applies assignment rules that you define to each candidate.

For information on automatically assigning service requests using Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

## Escalation and Notification

You can use the Siebel Business Process Designer to manage business processes in your organization. For example, you can address such challenges as automating escalation of events and notification of appropriate parties, routing and assigning work, processing work, and enforcing authorization and transition rules.

To use the escalation and notification engine, see *Siebel Business Process Designer Administration Guide*.

## CTI Integration and CTI Connect

Siebel CTI (Computer Telephony Integration) provides voice-channel support for call center agents using Siebel Business Applications. CTI capabilities are provided through integration with third-party CTI middleware packages, such as Intel NetMerge.

Siebel CTI Connect includes Intel NetMerge middleware components. These components include Intel NetMerge Call Processing Software (formerly Dialogic CT Connect) and Intel NetMerge Call Information Manager (formerly Dialogic Call Information Manager).

Siebel CTI Connect also includes the Siebel communications driver for Intel NetMerge and sample Siebel communications configuration data. Sample provided communications configurations contain events and commands that support CTI functionality.

For more information on configuring and setting up the communications server for Siebel HelpDesk and communication middleware, see *Siebel Communications Server Administration Guide*.

# Scenario for Siebel HelpDesk

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

## Administrator

An organization using Siebel HelpDesk 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 tasks:

- 1 [Setting Up Siebel HelpDesk Responsibilities on page 17](#)
- 2 [Setting Up Siebel Knowledge Base for HelpDesk on page 18](#)
- 3 [Working with the HelpDesk Solutions Database on page 19](#)
- 4 [Using Siebel Automated Service on page 21](#)
- 5 [Enabling Service Level Management on page 23](#)

## Setting Up Siebel HelpDesk Responsibilities

Before a user can run Siebel HelpDesk, you must associate the user with the appropriate responsibilities.

Siebel HelpDesk is preconfigured with several responsibilities that are specific to Siebel HelpDesk. Organizations can use these preconfigured responsibilities to set up help desk users. [Table 3](#) 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 Business Applications*.

This task is a step in [Process of Setting Up Siebel HelpDesk on page 17](#).

Table 3. Preconfigured Siebel HelpDesk Responsibilities

Responsibility	Comments
Change Management	Users with this responsibility can access the Change Management module.
ERM Analytics HelpDesk	Users with this responsibility can access the Analytics reports for HelpDesk.
ERM User	Users with this responsibility can access the HelpDesk online.
HelpDesk Agent	Users with this responsibility can access the Siebel HelpDesk views.
Universal Agent	Users with this responsibility can access the Call Center views.

#### ***To set up Siebel HelpDesk agent responsibilities***

- 1 Log in to the Siebel application (for example Siebel Call Center).
- 2 Navigate to the Site Map > Administration - Application > Responsibilities view.
- 3 In the Responsibilities list, query to find the responsibility with which you want to associate an employee.
- 4 In the Users subview list, click the menu button, and then click New Record.
- 5 In the Add Users dialog box, query to find the user you want to add, and then click OK.

## **Setting Up Siebel Knowledge Base for HelpDesk**

Siebel HelpDesk 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*.

This task is a step in [Process of Setting Up Siebel HelpDesk on page 17](#).

# 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 HelpDesk 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 17](#). It includes a number of related tasks, which are described in this topic.

## 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 must be called ERM Top Solutions.

### To add a solution to a Siebel ERM Category

- 1 Navigate to the Site Map > Administration - Catalog > Catalog Administration view.
- 2 In the Catalog list, query to find ERM Catalog.
- 3 In the ERM Catalog record, click the ERM Catalog link in the Name field.
- 4 In the Categories list, select the category you would like to add a solution to.  
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.

**NOTE:** If the Solutions link does not appear, click the arrow button to view more links. The arrow button is located next to the last link on the right side of the screen.

- 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.

For more information, see [“To create a resolution for Siebel HelpDesk” on page 20](#).

- 3 (Optional) Associate the resolution item with a resolution category.

For more information about associating existing resolutions with a category, see [“Categorizing a HelpDesk Resolution” on page 20](#).

- 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 Navigate to the Site Map > Administration - Resolution Documents view.
- 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 Navigate to the Site Map > Administration - Catalog > Catalog Administration view.
- 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 tab.
- 6 In the Resolution Items list, add a record, and complete the necessary fields.

## Using Siebel Automated Service

The Siebel Automated Service product can be used to automatically collect diagnostic information from the user's IT equipment when the user submits an Issue over the Web using the HelpDesk Online product. In addition, remote desktop management can also be enabled using the Siebel Automated Service product. These two functions become available through the SmartIssue and SupportCenter tabs of the Service Request - HelpDesk.

To enable SmartIssue and SupportCenter remote management information, you need to first enable the SmartIssue tab and the SupportCenter tab; furthermore, there are some initial configurations that are necessary for the applet Employee Service Request List Applet (ERM). To enable SmartIssue and SupportCenter remote management, you need to perform the following task.

This task is a step in [Process of Setting Up Siebel HelpDesk on page 17](#).

### To enable SmartIssue

- 1 Using Siebel Tools, add a field to the Employee Service Request List Applet (ERM) applet.  
For more information about adding fields using Siebel Tools, see *Using Siebel Tools*.
- 2 Select the Employee Service Request List Applet (ERM) applet in EDIT mode and add the following field to the applet with corresponding properties as shown in the following table.

Property	Value
Caption	SmartIssue #
Field	SmartIssue
HTML Type	Field
Name	Diagnostic #
Read Only	FALSE

- 3 Add a field to the Employee Service Request Detail Applet (ERM) applet by selecting the Employee Service Request Detail Applet (ERM) applet in Base mode and add the following SmartIssue field to the applet with corresponding properties as shown in the following table.

Property	Value
Caption	SmartIssue #
Field	SmartIssue
HTML Type	Field
Name	Diagnostic #
Read Only	True

- 4 Paste the following eScript in the Applet Browser Script under the OnClick event of the WriteRecord event for the Employee Service Request List Applet (ERM) applet.

```
function Edit_O_Control_WriteRecord_onclick (applet, id)
{
var IssueID;
var ProblemDescription;
var bRet;
var si;

        si = new ActiveXObject("SdcUser.SmartIssue.1");
if (si == null)
{
    alert("Unable to Create the Support Automation ActiveX control");
}

        // set the name of your supportSoft server in the line below
        si.SetCurrentServer ("http://localhost/global/");

// Getting the Title field value from the SR form
var oProblemDescControl = document.SWEForm3_0.s_3_2_28_0.value;
//alert("Value of oProblemDescControl = "+ oProblemDescControl);

// Setting the SI description field
IssueID = si.NewIssue(ProblemDescription);

// Setting the SmartIssue field with the value of SI #
document.SWEForm3_0.s_3_1_18_0.value = IssueID;

//alert("IssueID = "+ IssueID);

bRet = si.submitIssue(IssueID, "");
//alert("Submitted SI = "+ IssueID);
```

```
}
```

The two fields on the document referred to in the script as

```
document.SWEForm3_0.s_3_2_28_0.value
```

```
document.SWEForm3_0.s_3_1_18_0.value
```

may change the values at compile time. It is recommended that you verify the name of the fields from the HTML code at run time by viewing the source of the HTML through the browser.

You should also remember to set the correct SupportSoft Server URL in the script.

- 5 Navigate to View > Options > Scripting to set the correct path for your browser script to be deployed and do one of the following:

- If you are deploying the English version of Siebel ERM on the Siebel Server (zero-install client), set the browser script compilation folder to the following:

```
c: \sea771\si ebsrvr\WEBMASTER\ENU
```

After compiling the applet, a new folder called <srfxxxxxxxxxx\_xxx> is created in the c: \sea771\si ebsrvr\WEBMASTER\ENU folder.

- If you are deploying the English version of Siebel ERM on the Siebel Web Client, set the browser script compilation folder to the following:

```
c: \sea771\WebClient\PUBLIC\enu
```

- 6 Navigate to the Administration - Integration screen.
- 7 Navigate to WI Symbolic URL List screen.
- 8 Navigate to the Host Administration screen.
- 9 Change the Name of the Virtual Name to the server name of your Siebel Automated Service server.
- 10 Navigate to the Service Request - HelpDesk screen.
- 11 SmartIssue and SupportCenter views are populated with auto information.

For more information on how to configure the Siebel Automated Service License Discovery functionality, see the SupportSoft and ADM documentation on the *Siebel eBusiness Third-Party Bookshelf*.

## Enabling Service Level Management

To ensure the Verify button works to show the list of entitlements, make sure the business process called *FS - Verify Entitlement SR Helpdesk* is active and deployed. First you must set the communications profile and then verify that the business services are running as described in the following procedures.

For more information on Service Level Management, see ["Service Level Management \(SLM\)" on page 55](#).

This task is a step in [Process of Setting Up Siebel HelpDesk on page 17](#).

### *To set the communications profile*

- 1 Navigate to the Administration - Communications > Communications Drivers and Profiles view.
- 2 In the Communications Drivers list, select the Internet SMTP/POP3 Server record, and then click the Profiles tab.

The list includes profiles you can use, for example support@abc.com or HelpDesk@abc.com

- 3 Set the workflow's communications profile argument CommProfile to the account name of the POP3 Server email server by completing the following steps:
  - a In the Profile Parameters Overrides list, click New.
  - b In the Name field, select POP3 Server.
  - c In the value field, fill in the value for the communications driver, for example Support@Demohost.abc.com.

### *To verify business services are running*

- 1 Navigate to the Administration - Server Configuration > Enterprises Components view.
- 2 In the Component Groups list, query for Communications Management, and then verify that the Enabled state field says Enabled.
- 3 Verify that the Communications Server component Communications Outbound Manager is running by viewing the Communications Server component list and querying for Communications Outbound Manager.

## **Setting Up Links on the Service Request Home Page**

It is recommended that administrators set up links on the Service Request home page that correspond to the four main types of Service Requests—Incidents, Problems, Known Errors, and Requests for Change. To set up the links, perform the following procedure.

### *To set up links on the Service Request home page*

- 1 Navigate to the Administration - Application > View Links view.
- 2 In the Screen Homepages list, select the Service Requests record.



- 3 In the View Links form create a new record for each of the four links (All Incidents, All Problems, All Known Errors, and All Requests for Change) by completing the fields described in the following table.

Name	Description	View	Default Query
All Incidents	All HelpDesk Incidents	All Service Request View (HelpDesk UI)	All Incidents
All Problems	All HelpDesk Problems	All Service Request View (HelpDesk UI)	All Problems
All Known Errors	All HelpDesk Known Errors	All Service Request View (HelpDesk UI)	All Known Errors
All Requests for Change	All HelpDesk Requests for Change	All Service Request View (HelpDesk UI)	All Requests for Change



# 4

## IT Service Management Solution Set

This chapter is about managing the IT Service Management Solution set. It includes the following topics:

- [About IT Service Management Solution Set on page 27](#)
- [Scenario for IT Service Management Solution Set on page 28](#)
- [Process for IT Service Management Solution Set on page 29](#)
- [Incident Management on page 30](#)
- [Problem Identification and Management on page 33](#)
- [Change Management on page 36](#)
- [Managing Known Errors on page 45](#)
- [Asset and Siebel Automated Discovery on page 49](#)
- [Service Level Management \(SLM\) on page 55](#)

For information about setting up and using Siebel HelpDesk features and resources that administrators can use to set up other features, see [Chapter 3, "Setting Up HelpDesk."](#)

## About IT Service Management Solution Set

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. IT Service Management is divided into two areas: Service Support and Service Delivery. Together, these areas encompass disciplines that can help you manage the provisioning and maintenance of IT services.

This chapter describes logging, tracking, and solving incident records. It explains how a problem is identified and how to associate known errors and request for change records to incident and problem records. It also provides information about Asset, Change, and Service Level Agreement Management.

For information on analysis reports available for IT Service Management Service Support and Delivery business processes, see *Siebel Analytics User Guide*.

## Scenario for IT Service Management Solution Set

This scenario provides an example of an IT Service Management Solution Set process performed by a Siebel HelpDesk agent. Your company may follow a different process according to its business requirements.

A Siebel HelpDesk agent at a large company is responsible for managing incident records. First the agent begins with an individual incident, for example a user not being able to access her email. The agent then must determine if the incident is a problem experienced by an organization's employee or if the incident is a part of a larger problem that is affecting the organization's infrastructure. If it is a problem experienced only by an individual employee, an agent identifies either a solution or a temporary solution. If an agent cannot identify a solution or temporary solution, the agent associates a workaround with the record. The agent identifies the error, resolves it, and then closes the incident record.

If the incident is it is part of a larger problem (an incident record, rather than an incident), then the agent investigates for the overall problem that is affecting the infrastructure. For example, if the incident record is a user not able to access her email, the HelpDesk agent drills down into the HelpDesk Service Requests view and checks from a list of available problem records to see if a there is a larger system issue—for example the Email Exchange Server is down.

When the root cause of the problem is identified, in this case that the Email Exchange Server is down, the agent associates the problem record to a known error. The agent then creates a request for change that is associated with the known error. A *request for change* is a formal way to request a change within the infrastructure.

Figure 1 illustrates the workflow as described in the preceding paragraphs for working with the Siebel IT Service Management set.

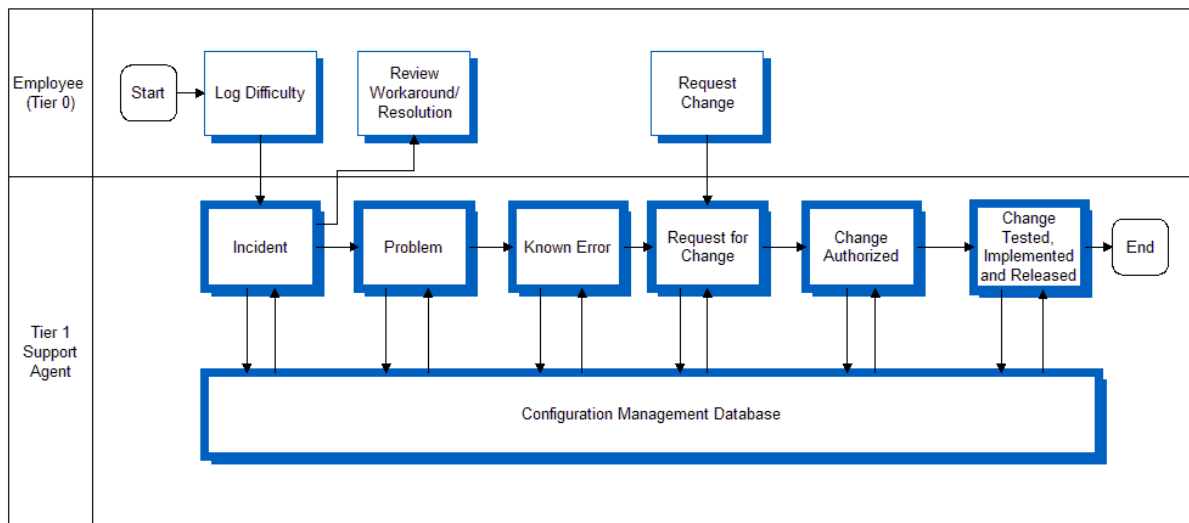


Figure 1. IT Service Management Workflow

# Process for IT Service Management Solution Set

This example process represents some of the tasks a HelpDesk agent typically performs based on the [“Scenario for IT Service Management Solution Set” on page 28](#).

- [“Adding Incident Records” on page 31](#)
- [“Investigating and Diagnosing Incident Records” on page 32](#)
- [“Resolution and Recovery of Incident Records” on page 33](#)
- [“Adding Problem Records” on page 34](#)
- [“Investigating and Diagnosing Problem Records” on page 36](#)
- [“Adding Request for Change Records” on page 38](#)
- [“Recording Request for Change Records Details” on page 39](#)
- [“Adding Request for Change Record Users” on page 40](#)
- [“Adding Request for Change Record Approvers” on page 40](#)
- [“Approving Request for Change Records” on page 41](#)
- [“Change Approval Access” on page 42](#)
- [“Scheduling Request for Change Records” on page 43](#)
- [“Adding Tasks to Request for Change Records” on page 43](#)
- [“Adding Activities to Request for Change Records” on page 44](#)
- [“Submitting Request for Change Records for Approval” on page 44](#)
- [“Recalling Approved Request for Change Records” on page 45](#)
- [“Closing Related Incident and Problems Records” on page 45](#)
- [“Adding Known Errors” on page 47](#)
- [“Assessing Errors” on page 47](#)
- [“Adding and Closing Error Resolutions” on page 48](#)
- [“Adding Assets to Request for Change Records” on page 54](#)
- [“Using Service Level Management \(SLM\)” on page 55](#)
- [“Setting Urgency and Impact Fields for Incident Records” on page 57](#)

# Incident Management

Incident Management automates the process of reporting and tracking an incident or groups of incidents. HelpDesk agents can open incident records to document and flag problems with software, equipment, facilities, network problems, and so on. Furthermore, agents match the incident against possible known errors, assign the incident based on both impact and urgency, review the recommended priority, and set the correct priority. In addition, HelpDesk agents give initial support—that is, provide quick fixes if appropriate. If a fix or quick fix is not possible, agents escalate the incident to the appropriate group.

Managers and technicians track the status and activities performed to achieve resolution as the categorized incidents moves through the stages of problem, known error, and a request for change.

Siebel HelpDesk can be configured to automatically create incident records using the Siebel Automated Service product. For more information on creating incident records automatically, see the *Siebel Business Third-Party Bookshelf* documentation for SupportSoft's Resolution Suite applications.

Figure 2 illustrates the HelpDesk agent workflow as described in the preceding paragraphs for working with Incident Management.

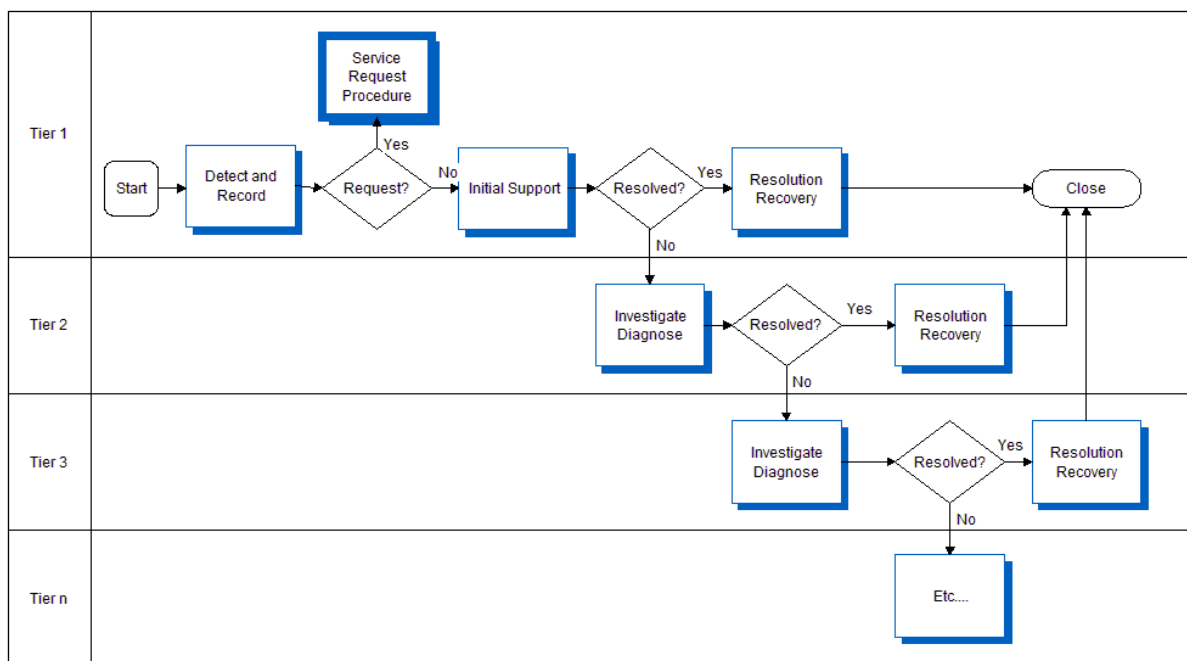


Figure 2. Incident Management Workflow

## Adding Incident Records

Incident management automates the process of reporting and tracking an incident or groups of incidents. HelpDesk agents open incident records to document and flag problems with software, equipment, facilities, network problems, and so on. They perform then perform initial analyses of the incident records they add, and assign the records for resolution. Finally, they link the incident records to known assets—for example if a customer calls to report a faulty product, the agent can link the incident report to the asset number of the faulty product.

You can view all incident records from the Service Requests - HelpDesk view by selecting All Incidents from the Queries drop-down list.

### *To add incident records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
SR Type	Select Incident.
Source	Classify the incident by assigning how the service request was reported, for example over the phone or email.
Title	Describe the incident problem, for example Email Problem or Cannot Access Outlook.
Impact	Describe the impact the incident has on the user, for example High, Medium, or Low. How the Impact field is set affects the Recommended Priority.
Urgency	Describe the urgency the incident has to the user, for example High, Medium, or Low. How the Urgency field is set affects the Recommended Priority.
Recommended Priority	Automatically assigned by how the Impact and Urgency fields are described. For example, if the Impact field is Medium and the Urgency field is set to High, the Recommended Priority field is then automatically set to 2-High.
User Priority	Describes the priority for the incident as set by the user. The Recommended Priority may or may not be the same as the User Priority.
Agent Priority	Describes the priority for the incident as set by the agent. The Recommended Priority may or may not be the same as the User Priority.

- 3 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 4 In the Service Requests - HelpDesk list, click the SR # link.

- 5 In the Owner field, click the select button.  
The Pick Service Request Owner dialog box appears.
- 6 Select the owner, and click OK.

## Investigating and Diagnosing Incident Records

When the incident has been escalated to an assignment group, the assignment group begins to work toward a resolution. The assignment group typically assesses the incident details, collects and analyzes all related information, identifies possible resolutions, and updates incident report details.

### *To identify solutions for incident records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR # link.
- 3 Click the Solutions view tab.
- 4 Click Add.  
The Add Solutions dialog box appears.
- 5 Select the solution you want to add, and click Add.

### *To associate incident records to other incident or problem records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR # link you want to associate to a known problem.
- 3 In the Problem title field, click the select button.
- 4 In the Pick Service Request dialog box, select the known error that matches the incident, and then click OK.

### **Related Topic**

[Adding Request for Change Records on page 38](#)

### *To link incident records to asset information*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR # link you want to link to previous assets or caller information.
- 3 Click the More Info view tab.
- 4 In the Asset # field, click the select record.



- 5 In the Pick Asset dialog box, select the asset to which you want to link the incident report.

#### Related Topics

[“Asset and Siebel Automated Discovery” on page 49](#)

[“Adding Assets to Request for Change Records” on page 54](#)

## Resolution and Recovery of Incident Records

The assignment group is responsible for the incident’s resolution. The assignment group typically performs the following tasks:

- Resolves the incident.  
For more information, see the procedure that follows this section.
- Opens a request for change (RFC) when the incident cannot be resolved.  
For more information about request for change records, see [“Recording Request for Change Records Details” on page 39](#).
- Takes recovery actions. A *recovery action* is a permanent solution, a workaround, or temporary fix.  
For more information about recovering actions, see [“Change Management” on page 36](#).
- Notifies the help desk that the incident is resolved.  
For more information about resolving incidents, see [“Closing Related Incident and Problems Records” on page 45](#).

#### *To resolve incident records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, select the SR you want to resolve.
- 3 In the Status field, select the appropriate description, for example Closed.
- 4 In the Substatus field, select the appropriate description, for example Resolved.

## Problem Identification and Management

Problem Management seeks to address the root cause of incidents and then initiate actions to improve or correct the situation. Incident records are escalated to problem records by associating the incident with a problem record. When a problem record is closed, all incidents that are associated with the problem record are closed as well. Problem Management includes notification, root cause analysis, and impact analysis.

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.

In the IT Service Management 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.

Figure 3 illustrates the workflow as described in the preceding paragraphs for working with problem management.

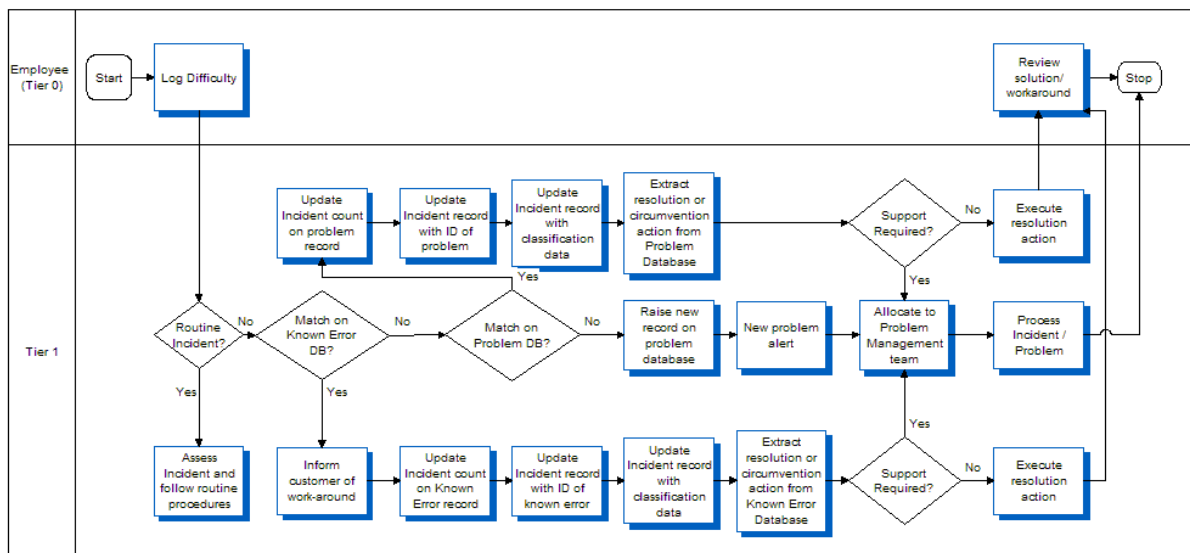


Figure 3. Problem Management Workflow

## Adding Problem Records

All related incident records are associated with the problem record through the Incident view tab. When the problem record is closed, the child incidents can be closed by clicking the Close Incidents button.

Problem records help agents to determine the impact of a failing component as well as the amount of effort required to recover that component. To create useful problem records, HelpDesk agents must determine the problem's category, impact, urgency and priority.

You can view all problem records from the Service Requests - HelpDesk view by selecting All Problems from the Queries drop-down list.

**To add problem records**

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
SR Type	Select Problem.
Problem #	<p>The problem number is automatically generated when the user selects the problem title.</p> <p>The HelpDesk agent clicks the Problem # link to see all the problems that affect the IT infrastructure system. The agent matches the problem through the Area and Sub Area fields.</p>
Problem Title	<p>A <i>problem</i> is a grouping of incidents within the overall IT infrastructure. Select the problem title (or create a new one) that matches against possible known errors or add an appropriate title—for example Email Exchange Server.</p> <p>Agents use the Problem Title field to see the impact of the problem on the IT infrastructure by seeing how many incidents have been assigned to the problem so far.</p>
Impact	Describe the impact the problem has on the IT infrastructure, for example High, Medium, or Low. How the Impact field is set affects the Recommended Priority.
Urgency	Describe the urgency the incident has to the IT infrastructure, for example High, Medium, or Low. How the Urgency field is set affects the Recommended Priority.
Recommended Priority	Automatically assigned by how the Impact and Urgency fields are described. For example, if the Impact field is Medium and the Urgency field is set to High, the Recommended Priority field is then automatically set to 2-High.
User Priority	Describes the priority for the problem as set by the user. The Recommended Priority may or may not be the same as the User Priority.
Agent Priority	Describes the priority for the problem as set by the agent. The Recommended Priority may or may not be the same as the User Priority.

**To view all incident records that are associated to a problem record**

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, select the record, and then click the Problem title link.
- 3 In the HelpDesk Service Request screen, click the Incidents view tab.

All the incident records that are associated with the problem record appear. From here you can close incident records by clicking the Close Incidents button.

# Investigating and Diagnosing Problem Records

Use the following procedure to investigate and diagnose problem records in HelpDesk. If you have finished investigating and diagnosing problem records, you can close the incident record directly from the problem record view.

## *To investigate and diagnose problem records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, perform either of the following actions:
  - Select the incident associated to the problem and then click the Problem Title link.
  - Query for All Problems in the query field.
- 3 Click the Solutions view tab and query the records to determine if any known solutions or workarounds are related to the problem record.
- 4 Click the Incidents view tab and query the records to determine if any known incident records are related to the problem record.
- 5 Click on the More Info view tab to assign a Root Cause Code and add a Resolution Code.
- 6 When Root Cause and Resolution Code have been diagnosed, change the SR Type to Known Error.

After a Problem has a Root Cause and Resolution code assigned to it, it should be categorized as a Root Cause. The resolution for a known error can either be through a workaround or through a change management record. A known error record must have either a workaround or a change management record assigned to it before being closed. For more information about known errors, see ["Managing Known Errors" on page 45](#).

## *To close an incident record from a problem record*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, select the record, and then click the Problem Title link.
- 3 In the HelpDesk Service Request screen, click the Incidents view tab.
- 4 Select the incident record, then click Close Incidents.

# Change Management

Error control monitors progress in resolving known errors, and Change Management processes requests for changes. Root cause analysis monitors the impact of problems and known errors on services. If the impact becomes severe, root cause analysis escalates the problem.

Change Management or a request for change is a formal way to request a change within the overall IT infrastructure or system. Therefore, a 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 record is created. Change 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 record is successfully implemented, the record is closed and associated requests for change records and problem records are also closed.

The Siebel Change Management solution seeks to ensure standardized methods and procedures for efficient and prompt handling of all changes. The goal is to minimize the impact of change-related incidents on service quality, and consequently to improve the day-to-day operations of the organization.

The following sequence is the typical workflow (as shown in [Figure 4](#)) for working with Change Management.

- 1 "Adding Request for Change Records" on page 38
- 2 "Recording Request for Change Records Details" on page 39
- 3 "Adding Request for Change Record Users" on page 40
- 4 "Adding Request for Change Record Approvers" on page 40
- 5 "Approving Request for Change Records" on page 41
- 6 "Change Approval Access" on page 42
- 7 "Scheduling Request for Change Records" on page 43
- 8 "Adding Tasks to Request for Change Records" on page 43
- 9 "Adding Activities to Request for Change Records" on page 44
- 10 "Submitting Request for Change Records for Approval" on page 44
- 11 "Recalling Approved Request for Change Records" on page 45

## 12 “Closing Related Incident and Problems Records” on page 45

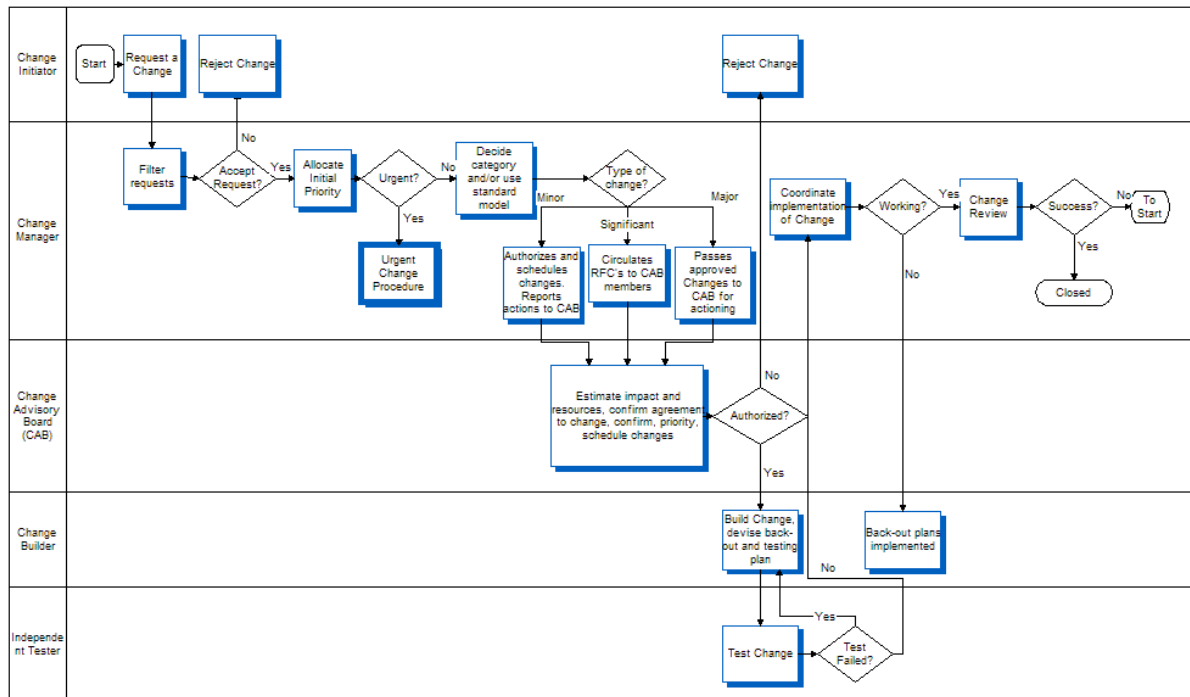


Figure 4. Change Management Workflow

## Change Management Roles

The job roles associated with Change Management are as follows:

- **Change Administrator.** The change management administrator, the persons responsible for planning, setting up, and maintaining administrator-related tasks.
- **Change Initiator.** A person who may not have the authority to request a change and therefore works through a change sponsor. The initiator enters the planned start and end date of the change and the description of the change as well as the Category, Impact, and Urgency fields.
- **Change Owner.** The coordinator and person responsible for getting the entire change completed. The owner enters the notes of the change regarding the backout plans and so on, the tasks required for the change, and the date and times to carry out the change.
- **Change Approver.** The person who has the authority to approve a request a change.

## Adding Request for Change Records

Request for changes can be driven from one of two scenarios, associating a request for change to a problem record or creating a request for change directly from the Change Management screen.

In the first scenario, request for changes are generated as a way to resolve a problem or known error, for example resolving the known error of an email server being unavailable.

In the second scenario, changes are created because a change is required for a business opportunity, for example a server being built or decommissioned.

**NOTE:** You can view all request for change (RFC) records from the Service Requests - HelpDesk view by selecting All RFCs from the Queries drop-down list.

### *To associate a request for change to a Problem record*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, do one of the following:
  - Select the incident associated to the problem and then click the Problem Title link.
  - Query for All Problems from the Queries drop-down list.
- 3 In the Change Title field, click the select button.  
The Pick Request for Change dialog box appears.
- 4 Select the appropriate change and click OK.

## Recording Request for Change Records Details

Agents complete request for change details to determine the necessary categories and times of when changes will occur. In addition, they enter descriptions and the systems and subsystems the request for change will impact.

### *To record request for change details*

- 1 Navigate to the Change Management screen > Request for Change view.
- 2 In the Request for Change list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Examples
Category	Major, Standard, Minor
Impact	Major, Standard, Minor
Urgency	High, Medium, Low
Planned Start	Date and time
Emergency	Yes or no
Reason for Change	Request for change, known problem

Field	Examples
Category	Major, Standard, Minor
Priority	High, Medium, Low

## Adding Request for Change Record Users

HelpDesk agents use the Users view to add users to the request for change record. The default and primary member of the change is the Change creator.

### *To add change users*

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the Change record, and click the link in the Name field.
- 3 Click the Users tab and in the Users list, click New.
- 4 From the Add Employees dialog box, select change members, and then click OK.
- 5 In the Users list, select the primary user of the team, and then click the check box in the Primary field.

## Adding Request for Change Record Approvers

Change Management is linked to an approval engine, which supports the necessary approval processes required for Change Advisory Boards (CABs) and Emergency Change Advisory Boards (ECABs). HelpDesk agents can use the Approvers view to add the necessary approvers to the request for change record. The default is to have no approvers.

**NOTE:** You can view all request for change (RFC) records from the Service Requests - HelpDesk view by selecting All RFCs from the Queries drop-down list.

### *To add change users*

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Approvers tab, then in the Approvers list, click New.
- 4 From the Add Approvers dialog box, select the necessary approver from the list of existing users, and then click OK.
- 5 In the Approvers list, do one of the following:
  - For sequential approvals, associate the correct sequence number for the approvals.
  - For parallel approvals, make the sequence number for the parallel approvers the same number.



## Approving Request for Change Records

Setting the project status to For Approval triggers the creation of an Approval Inbox item. When you first get a change record for approval it appears in your inbox marked Received. If you click on the Name field you can drill down to the approver of the change record. Drilling down on the Name field in the Inbox takes the approver to the detailed project screen, which is the access list naming all the people associated with the project and whether their approval is necessary. The approver can then approve or reject the project from the Inbox or add comments, if necessary. After all approvers are received, the Status field changes to Active. The approval decision from each of the approvers is printed in the Approval Status field. You can view this field for a quick review of all the approvers, without having to search the Approvers inbox.

**NOTE:** You can view all request for change (RFC) records from the Service Requests - HelpDesk view by selecting All RFCs from the Queries drop-down list.

The Change Notification form only alerts the subsystem Id and System ID. HelpDesk agents can view System Status from the Siebel application home page.

HelpDesk agents can approve an active request for change in the following ways:

- 1 Emergency Change Advisory Board (ECAB).** The ECAB is a subset of the CAB that is responsible for assessing and approving changes classified as Emergency.
- 2 Change Advisory Board (CAB).** The CAB is made up of the key infrastructure groups and service managers who may be impacted by the request for change.
- 3 Direct Reporting (DRM) or Delegated Approver.** Approvers are automatically sent to the Change Initiators manager or, if the manager is unable to approve, to the delegated approver for that manager.
- 4 Auto-Approved Process (Auto).** Approvals are automatically given without user intervention, which is usually the case for low impact and low urgency changes.

Based on the Category, Urgency, and Severity fields set in the Request for Change form, the necessary approvers can be set. It is recommended that a list of users be set for the CAB and ECAB. The Auto approvers do not need to have any approvers set. You should also agree on whether the approvers require sequential or parallel approvers.

Category	Urgency	Severity			
		1-Critical	2-High	3-Medium	4-Low
<b>Major</b>	High	ECAB	ECAB	ECAB	ECAB
	Medium	DRM	DRM	Auto	Auto
	Low	DRM	DRM	Auto	Auto
<b>Standard</b>	High	ECAB	ECAB	ECAB	ECAB
	Medium	CAB	CAB	CAB	CAB
	Low	CAB	CAB	CAB	CAB
<b>Minor</b>	High	DRM	DRM	DRM	DRM
	Medium	Auto	Auto	Auto	Auto
	Low	Auto	Auto	Auto	Auto

## Adding Approval Lists

You can create approval lists for CABs, ECABs, and so on. To create approval lists, perform the following task.

### *To add approval lists*

- 1 Navigate to the Administration - Application > Approval Admin view.
- 2 In the Approval Item list, create a new record for CAB and ECAB and complete the necessary fields.
- 3 In the Approval Flow Type field, select either sequential or parallel for the approval flow:
  - Select sequential if sequential approval flow is required—that is, if Employee1 approves, then Employee2 approves next.
  - Select parallel if any one of the approvers can approve the change, for example either Employee1 or Employee2 can approve.
- 4 Add the employees to the list of approvers, and in the Approval Stage form, create a new record and complete the necessary fields.

## Change Approval Access

*Change approval* is a list of all the members who have access to the project. HelpDesk agents view this list through the access list. The necessary approvers appear in a separate tab. In the approvers' tab, administration can identify approvers and assign sequence numbers to them.

You can submit changes for approval or recall them if they are not approved. When you submit the changes, the Submit status changes to For Approval.

### *To view the access and request for change list*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR # link of which you want to resolve.
- 3 Click the Change Requests tab.

## Adding Notes to Request for Change Records

*Change notes* are notes that can be attached to the change project. The notes can include back-out plans if the change is unsuccessful, specific challenges, and so on.

HelpDesk agents use the Notes view to add notes to request for change records. To obtain the default notes for the change record, you must perform the following task.

***To add standard notes to a request for change record***

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Notes view tab and in the Notes list, click the Create Standard Notes button.  
The following standard notes are created:
  - Backout Plan
  - Change Successful
  - Implementation Notes
  - Notes for Future Change
  - Notes on Success or Failure
- 4 Enter the suitable text to each of these notes that have been created. To add, edit, or delete additional standard notes from the auto creation, change the LOVs HELPDESK\_PUBLIC\_NOTES.

## Scheduling Request for Change Records

For HelpDesk agents to schedule the actual implementations of the change records, they must use the Change Schedule tab of the change record.

***To schedule change records***

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Calendar tab, and in the Calendar, click the New button.
- 4 Enter the scheduling information into the calendar.

## Adding Tasks to Request for Change Records

Assign all build tasks. The Change Owner assigns the build tasks in line with the plan. Each task has a Task Owner. Siebel Change Management has the concept of tasks which can be assigned and which must all be completed before progress to completion. Within each task, multiple activities can be added.

***To add tasks to change records***

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Tasks tab, and in the Tasks list, click the New button.

- 4 Add a task record.
- 5 Drill down on the task record and add activities to the task.

## Adding Activities to Request for Change Records

In addition to adding activities from the Task view, Activities can be added as a stand-alone object separate from the task.

### *To add activities*

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Activities tab, and in the Activities list, click the New button.
- 4 Add an Activity record.
- 5 Drill down on the Activity record and add activities to the task.

## Submitting Request for Change Records for Approval

When the Change Initiator has completed all the necessary fields, the change record can be submitted for approval. To submit a change record for approval, the first thing you must do is verify that the change has all necessary approvers entered in the Approvals view and their corresponding sequence is set. Then, the Submit Change button on the More Info tab becomes enabled.

### *To submit change records for approval*

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the More Info tab, and in the More Info form, click the link in the Name field.

Note all fields are disabled and the status of the change record is changed from Not Yet Active to For Approval.

- 4 The first person on the approval list with the sequence number one receives the request for change in his or her Universal Inbox. This is accessed from the Inbox screen.
- 5 The approver can approve or reject the change from the Inbox and add suitable comments.
- 6 When all approvals have been collected electronically, the change is enabled and the status is changed to Active.

## Recalling Approved Request for Change Records

All changes that are in a status of For Approval can be recalled by clicking the Recall button on the More Info tab of the change record. This reenables all the fields on the form and the change record status changes back to Not Yet Active.

### *To recall approved change records*

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the More Info tab, and in the More Info form, click Recall Change.

## Closing Related Incident and Problems Records

When a change record is successfully implemented, the problem or related incident records can be closed. To close the incidents or problem records related to a change, you should first make sure the Change status is set to Closed, and then perform the following task.

### *To close all incident and problem records related to a change record*

- 1 Navigate to the Change Management screen.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Incident or Problem tab and in the list, click the Close Incidents button.
- 4 All the related incident and problem records are closed.

If you then want to close all the incidents related to the problem record, you should complete the following task.

### *To close all incident records related to a problem record*

- Drill down on the Problem Number and close the incidents using the Close Incidents button on the problem record.

## Managing Known Errors

The error management process begins with the detection of an underlying problem. Error management activities focus on processing known errors until they are eliminated by the implementation of a change or a workaround.

An error is identified when a problem is detected. The error becomes a known error when the root cause of the problem is found and a workaround is provided.

**NOTE:** You can view all known error records from the Service Requests - HelpDesk view by selecting All Known Errors from the Queries drop-down list.

The following is the typical sequence for identifying and recording known errors.

**1** An error is identified when a problem is detected.

The problem becomes a known error when the root cause of the problem is found and a workaround is provided. Make sure that the root cause ticket is updated with all resolution activity.

For more information about identifying errors, see ["Adding Known Errors" on page 47](#).

**2** Error assessment.

Perform an initial assessment of the means of resolving the error. If necessary, complete a request for change. Link the request for change record to the known error record.

For more information about error assessment, see ["Assessing Errors" on page 47](#).

**3** Error resolution recording.

Record the resolution for known errors in the resolution field of the known error. Enter the resolution information into a solution for the knowledge base. This knowledge base holds data symptoms and resolutions. This way, the data is available for help with future incidents and known errors. Attach the resolution information to the known error by way of a solution.

For more information about error resolution, see ["Adding and Closing Error Resolutions" on page 48](#).

**4** Error closure.

Close the known error record after changes have been successfully implemented by way of the Incidents and Problems tab of the change. Close any associated incident or root cause tickets through the Incidents tab.

**Related Topics**

["Problem Identification and Management" on page 33](#)

["Adding and Closing Error Resolutions" on page 48](#)

**5** Problem and Known Error resolution monitoring.

Error control monitors progress in resolving known errors and change management is responsible for the processing of request for changes. Root cause analysis monitors the impact of problems and known errors on services. If the impact becomes severe, root cause analysis escalates the problem.

**Related Topics**

["Problem Identification and Management" on page 33](#)

["Change Management" on page 36](#)

["Adding and Closing Error Resolutions" on page 48](#)

## Adding Known Errors

When adding a known error, make sure the root cause ticket is updated with all resolution activity.

### *To record known errors when a change record is required for resolution*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Title	Enter the desired title.
SR Type	Select known error.
Change Title	(Optional) Select the corresponding change record title.
Asset #	(Optional) Select an asset related to the known error.

### *To record known errors when a workaround is required*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, create a new record and complete the necessary fields.
- 3 Click the SR # link and then click the More Info view tab.
- 4 In the Categorization section, click the Root Cause drop-down list to select the root cause.
- 5 Click the Resolution Code drop-down list to select the resolution code.
- 6 Close the known error with a substatus of known error.

### *To associate a service request to a known error*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, select the service request.
- 3 In the SR Type Field, select the known error.

## Assessing Errors

When assessing errors you perform an initial assessment for resolving the error. If necessary, complete a request for change and then link the request for change record to the known error record. For more information about how to complete a request for change, see the [Asset and Siebel Automated Discovery on page 49](#) section.

## Adding and Closing Error Resolutions

Add the resolution for known errors in the root cause analysis system. Enter the data into the knowledge base. This base holds data on CIs (configuration items), symptoms, and resolutions. This way, the data is available for help with future incidents and known errors.

Close the known error record after changes have been successfully implemented. Also close any associated incident or root cause tickets at this time.

### *To record error resolutions*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR link of the error you want to resolve.
- 3 Click the More Info tab.
- 4 In the Change Title field, click the select button to select the request for change that resolves the error.

### *To close known error records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, SR Type Field, query for the known error.
- 3 Select the known error you want to close.
- 4 In the Status field, select Closed.

### *To associate root causes to records*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR link of the error you want to resolve.
- 3 Click the More Info tab.
- 4 In the Root Cause drop-down list, select the root cause that best fits your record.

### *To close an incident record from a known error*

- 1 Navigate to the known error record.
- 2 Click the Incidents tab.
- 3 Select the incident record, and then click Close Incidents.



## Asset and Siebel Automated Discovery

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.

## Siebel Automated Service

The Siebel Automated Service can help you manage assets such as hardware and software.

Asset and configuration management provides a model of the infrastructure or a service by identifying, controlling, maintaining, and verifying the versions of configuration items in existence.

Asset and configuration management performs the following functions:

- Accounts for the IT assets and configurations within the organization and its services
- Provides information on configurations and their documentation to support all the other IT Service Management processes
- Verifies the configuration records against the infrastructure and corrects any exceptions

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 documentation for SupportSoft/ADM on *Siebel Business Third-Party Bookshelf*. For more information on setting up assets, see *Siebel Field Service Guide*.

## Creating and Releasing Products

The first step in creating an asset management system is to create the necessary products. The product is the make and model of the asset. For instance, if the make and model of your asset is a Compaq Evo, you would need to create a product called Compaq Evo. When the product information is filled out correctly, you can release the product.

### *To create a product*

- 1 Navigate to the Administration - Product view.

- 2 In the Products list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Example
Product	Compaq Evo
Type	Product, Service, or Distribution

- 3 In the More Info view tab, make sure the Track as Asset check box is selected.  
If your asset has configuration attributes, go to [Step 4](#) and if your product is customizable, go to [Step 5](#) and then to [Step 6](#). When the product information is filled out correctly, you can release the product. For more information, see ["To release a product" on page 50](#).
- 4 (Optional) If the asset has configuration attributes associated with it, in the Structure Type drop-down list, select Customizable.
- 5 (Optional) If the product is customizable, click the Customizable Product view tab and then click the Details link.
- 6 (Optional) In the Details form, click the Product Class select button to select the product class.

### *To release a product*

- 1 Navigate to the Administration - Product view.
- 2 Click the Customizable view tab, and then click the Versions link.
- 3 In the Versions list, select the version record.
- 4 (Optional) Select the Lock flag check box if you want to update the product.
- 5 Click the Release New Version button.

## Creating Attribute Classes

When you want to store the configuration details of an asset, you need to create a list of configuration attributes for that product type. For example, for a Compaq Evo you may be interested in configuration attributes—that is, CPU Speed, Hard Drive Capacity, Memory, and so on.

### *To create a configuration class*

- 1 Navigate to the Administration - Product Classes view.

- 2 In the Product Classes list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Product Class	Enter a name for the product class
Locked Flag	By default this check box is selected
Locked By	Example: SADMIN

- 3 Click the Class Attributes view tab, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Enter a name for the attribute, for example CPU Speed.
Attribute Definition	Select the correct attribute definition, for example Text, Boolean, and so on.  If you are required to select one value from a list of values, you should create an Attribute Definition and associate it here. For more information about creating attribute definitions, see <a href="#">"Creating Attribute Definitions" on page 51</a> .
Default Value (Display)	If your configurations are standard, add a default value.

- 4 When you are finished with the class configuration, click the Product Classes link, and then click the Release New Version button.

## Creating Attribute Definitions

When you want to give a limited selection of values to the user for an attribute, you are required to create an attribute definition for that class attribute. An example of where this may be necessary could be which operating system a product should have. The number of operating systems may want to be constrained to the supported operating systems like Windows XP, Windows 2000, and so on.

### *To create an attribute definition*

- 1 Navigate to the Administration - Product Attribute Definitions view.

- 2 In the Product Attribute Definitions list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Attribute	Add a name for the attribute, for example Operating System.
Locked Flag	By default this check box is selected.
Locked By	Example: SADMIN

- 3 Click the Attribute Details view tab and add the details (for example Windows XP, Windows 2000 and so on) and the sequence you want the attribute definitions to be shown in.

For more information about setting up attributes, see the product attributes section in the *Siebel Product Administration Guide*.

You can now associate the attribute definition with a product attribute class and then a product. For more information, see [“Creating Attribute Classes” on page 50](#).

When an asset is instantiated from a customized product, the asset's customize button becomes enabled and the asset can be configured.

For more information about assets, see the setting up assets section in the *Siebel Field Service Guide*.

## Creating an Asset

Now that the products and attributes have been created successfully, you can proceed to create the assets.

### To create assets

- 1 Navigate to the Assets - HelpDesk view.
- 2 In the Assets - HelpDesk list, create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Product	Click the select button in the Product field to fill in the product, for example hard drive.
Asset Category	For example, Laptop, Desktop, Printer, Server, and so on.
Status	For example, Prototype, Evaluation, Installed, and so on.
Asset #	This field is filled in automatically.

## Associating Backup or Dependent Assets With a Primary Asset

An asset can have a dependency on another asset. For example, your primary asset may be a laptop. You might also have a backup asset—that is, another laptop. You can establish asset relationships—that is, backup or dependent assets. When you establish an asset relationship, you must also make sure to associate the employee to the asset as well.

### *To add employees to assets*

- 1 Navigate to the Assets screen > List view.
- 2 Select the asset record, and then click the Asset # link.
- 3 In the Employees field of the Asset form, click the select button to associate additional employees with an asset.

## Viewing Assets in the Database

You can view assets from a variety of fields in the Assets - HelpDesk view. The most common lists required by users are by status, that is Active, Inventory and so on or by asset category, that is laptop, desktop, and so on. The following status values described in [Table 4](#) should be available for the HelpDesk Asset view.

Table 4. Status Values in the HelpDesk Asset

Field	Comments
Active	Currently assigned to a user.
Disposed	Donated, retired, trashed, and so on.
Inventory	In inventory at one of our stocked sites.
Lease Returns	Returned to lessor to fulfill an end-of-lease obligation.
Stolen	Reported stolen.
On Loan	Loaned to a user for a specific period of time.
Pending Lease Return	Systematically flagged for return to lessor within 90 days.
RMA	Returned to vendor for maintenance.
Termed/To Be Recovered	Flagged for recovery from a terminated employee.
To Be Recovered	Flagged for recovery from a user.
Unknown Location	Lost, missing, or user is unknown.

## Using Asset Auto-Discovery Tools

The Siebel Automated Discovery tool can be used to automatically update inventory records with device configuration information entered in the Asset Management system by network agents. There are two views that show the software and hardware discovered by the Automated Discovery tool.

### *To display Asset AutoDiscovery information*

- 1 Navigate to the Administration - Integration screen > WI Symbolic URL List view.
- 2 From the visibility filter, select Host Administration.
- 3 In the Virtual Name field, change the name to the server name of your Siebel Automated Discovery server.
- 4 Navigate to the Assets screen > Assets - HelpDesk view.
- 5 Select the asset record, and make sure the Domain Name field and Machine Name a field are set—for example CORP for the Domain Name and dbri ndl ep4. corp. si ebel . com for the Machine Name.
- 6 Software and AutoDiscovery views are populated with auto-discovery information.

For more information on how to configure the Asset Auto-Discovery and Software License Discovery functionality, see the SupportSoft/ADM documentation on the *Siebel Business Third-Party Bookshelf*. For more information on setting up assets, see *Siebel Field Service Guide*.

## Adding Assets to Request for Change Records

HelpDesk agents use the Assets view to add the necessary assets to the request for change records. The default is to have no assets associated with the change record.

### *To add change users*

- 1 Navigate to the Change Management screen > Request for Change list.
- 2 In the Request for Change list, select the change record and click the link in the Name field.
- 3 Click the Assets view tab.
- 4 In the Assets list, create a new record and complete the necessary fields.

### **Related Topic**

[“Resolution and Recovery of Incident Records” on page 33](#)

## 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*.

## Using Service Level Management (SLM)

A visual indicator shows whether the incident record is active, closed, or has breached the associated Service Level Agreement (SLA).

Before you can perform the following task, you must make sure your service level management has been enabled. For more information about enabling your service level management, see [“Enabling Service Level Management” on page 23](#).

### *To verify incident records that have an associated Service Level Agreement*

- 1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.
- 2 In the Service Requests - HelpDesk list, click the SR # link.
- 3 Click Verify.

The Agent Committed field is automatically filled out with the date and time that the agent commits to resolving the incident or problem.

**NOTE:** If the incident is not resolved within the committed time, the Agent Escalation Time field is automatically set.

## Creating Service Level Agreements

If you need to first create Service Level Agreements (SLAs), then perform the following task.

### *To create SLAs*

- 1 Navigate to the Agreements screen > List view.
- 2 In the Agreements list, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Examples
Name	AA_Agreements
Account	ABC Company

Field	Examples
Type	Service Level Agreements
Status	Current

- 3 In the Name field, click the link.
- 4 Click the Entitlement view tab, create a new record and complete the necessary fields.  
Some fields are described in the following table.

Field	Examples
Type	Service
Service Hours	24 hours, 7 days a week

- 5 Click the Contacts view tab, and then click Add to add the contacts to which the entitlement relates.  
  
This is the user who submits the ticket. Be sure to enter the supported channels for the entitlement—for example, if you only support your users over the Web, then select the Internet check box only. Select only the check boxes for the channel you want to support—for example All Products, Phone, Email, and so on.
- 6 Click the Products view tab, to add the assets the entitlement relates to, create a new record and complete the necessary fields.  
  
When an incident or problem record is created against that asset, the agreement is used.
- 7 Click the Metrics view tab, create a record and complete the necessary fields.  
Some fields are described in the following table.

Field	Comments or Examples
Type	Response Time
Value	Enter the recommended time for the escalation and resolution time—for example 4 hours.  For more information about recommended times for SLA entitlements, see <a href="#">Table 5 on page 58</a> .
Units	Days, Hours, Percentage, and so on
Priority	ASAP, High, Medium, or Low
Service Hours	24 hours, 7 days a week



- 8 Click the Metrics view tab, create a record and complete the necessary fields.  
Some fields are described in the following table.

Field	Comments or Examples
Type	Escalation Time
Value	Enter the recommended time for the escalation and resolution time—for example, 4 hours.  For more information about recommended times for SLA entitlements, see <a href="#">Table 5 on page 58</a> .
Units	Days, Hours, Percentage, and so on
Priority	ASAP, High, Medium, or Low
Service Hours	24 hours, 7 days a week

## Setting Urgency and Impact Fields for Incident Records

The urgency and impact of incident records are set based on the Recommended Priority code. [Figure 5 on page 57](#) details the settings for setting urgency and impact fields.

		Impact		
		High	Medium	Low
Urgency	High	1-Critical	2-High	3-Medium
	Medium	2-High	3-Medium	4-Low
	Low	3-Medium	4-Low	5-Question

Figure 5. Setting Urgency and Field Records

The following Service Level Agreement Entitlements are recommended to correlate with the preceding recommended priorities. These recommended entitlements then set the necessary Committed and Escalation Times on the incident record.

[Table 5](#) describes the recommended times for SLA entitlements. These are only examples of recommended SLA entitlements; your company may decide to set them differently.

Table 5. Recommended Times for SLA Entitlements

Priority Code	Description	Target Resolution Time	Escalation Time
1	Critical	1 hour	0 hours
2	High	8 hours	6 hours
3	Medium	24 hours	18 hours
4	Low	48 hours	36 hours
5	Question	Unspecified	Unspecified

# 5

## 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 59](#)
- [Process of Setting Up Employee Self-Service on page 60](#)
- [Creation of Employee Self-Service Forms on page 62](#)
- [Importing a Preconfigured Employee Self-Service Form on page 64](#)
- [Customizing a Preconfigured Self-Service Form on page 65](#)
- [Designing Employee Self-Service Requestor Forms on page 66](#)
- [Creating an Employee Self-Service Summary Form on page 69](#)
- [Linking Self-Service Forms to the Inbox on page 73](#)
- [Linking ESS Forms, Literature, and Solutions to Employee Directory on page 75](#)
- [Associating ESS Forms with Employee Directory on page 76](#)
- [Releasing and Testing Employee Self-Service Forms on page 76](#)
- [Accessing and Submitting Self-Service Forms on page 77](#)

### 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 additional information.

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), reviews the screens, and adds information as 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 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 6](#) 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 64](#)
- [Customizing a Preconfigured Self-Service Form on page 65](#)
- [Designing Employee Self-Service Requestor Forms on page 66](#)

- [Creating an Employee Self-Service Summary Form on page 69](#)
- [Linking Self-Service Forms to the Inbox on page 73](#)
- [Associating ESS Forms with Employee Directory on page 76](#)
- [Releasing and Testing Employee Self-Service Forms on page 76](#)

### Related Topic

[Creation of Employee Self-Service Forms on page 62](#)

## End-User Procedures

The end-user process has a single path for requestors. As [Figure 6](#) 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—for example change business title, job transfer, or change location. The submit process is then activated—for example confirm business title, job transfer or location. 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 77.

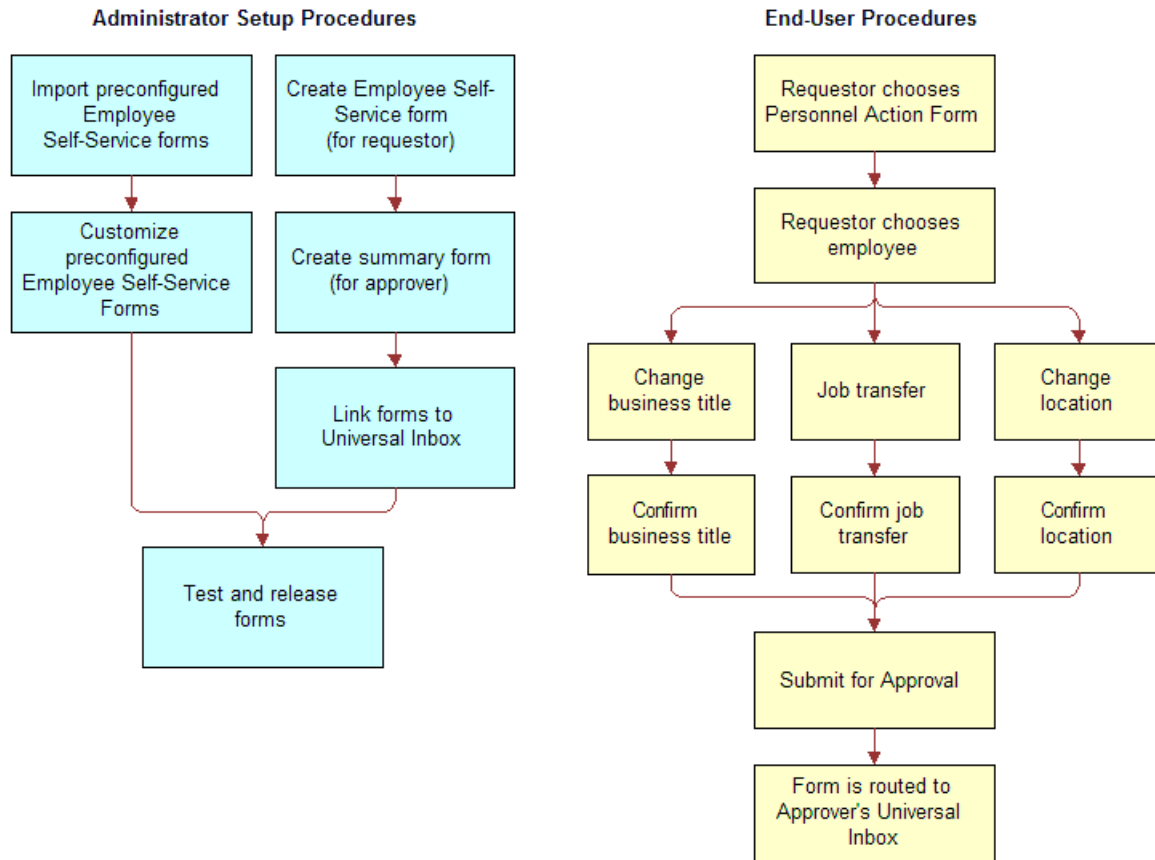


Figure 6. Business Process for Employee Service

## 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 7](#), 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.

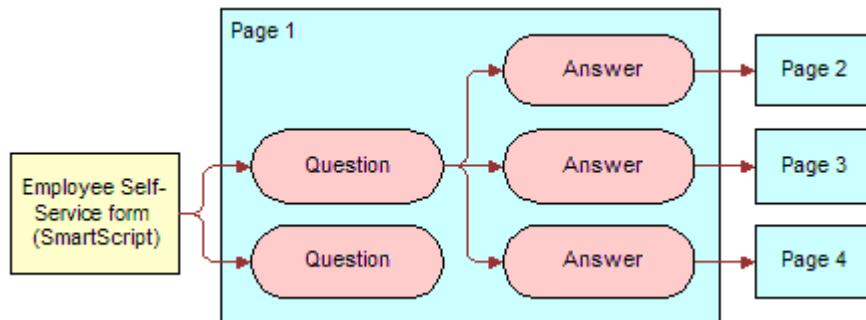


Figure 7. Example of Branching Logic for Employee Self-Service

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 60](#)

## 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 6](#) 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 60](#).

Table 6. 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
Personal Data Change	This form is used for changes to: <ul style="list-style-type: none"><li>■ Name</li><li>■ Address</li><li>■ Cell phone number</li></ul>
Personnel Action Form (PAF)	This form is used for changes to: <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 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 3 In the Scripts list, select a form (SmartScript), listed in [Table 6](#) 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 3](#) (including substeps) 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** Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 3** In the Scripts list, click the menu button, and then choose Import Script.

The Import Script form appears.

- 4** In the form, select Update in the In case of error field.

**NOTE:** 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.

- 5** In the File Name field, click the select button.
- 6** In the Add Attachment dialog box Browse for the saved SmartScript form.
- 7** 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 60](#).

### ***To customize a preconfigured employee self-service form***

- 1** Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 76](#).

**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 can define a form, you must meet the following requirements:

- Be familiar with Siebel application user interface standards.
- Be familiar with Siebel SmartScript. For more information on SmartScript, see *Siebel SmartScript Administration Guide*.
- Be familiar with Siebel Visual Basic or Siebel eScript programming and have an understanding of your company's Siebel application installation, if you are planning advanced scripting initiatives.
- Have access to translations of script elements for each language, if the script is run in multiple languages.

### Preparation

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 7 on page 63](#) 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 60](#).

### *To create a form for a requestor*

- 1 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 60](#)

## 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** Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 the Siebel application 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 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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.

### Preparation

Before you create a form, complete the following tasks:

- 1 Map out the summary form. Use the flow diagram example shown in [Figure 7 on page 63](#) 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 60](#).

### *To create a summary form for an approver*

- 1 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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.

```
function Script_Open ()
{
    var PageFirstPage;
    var QuestLastName;
    var szLastName = "";
    var szScriptSessionId = "";
    var boCallScripts;
    var bcCSRunAnswer;

    // 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");
    }

bcCSRRunAnswer = null;
boCallScripts = null;

// Set the values of each question by the scripting
    QuestLastName.SetCurrentValue (szLastName);

return;

```

```
}
```

**NOTE:** The eScript form appears at the bottom on the page. You may need to scroll down to see the entire form.

## 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 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 the Example eScript for Summary Form section in the *Siebel Employee Relationship Management Administration Guide*.

- 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 on making a field read-only, see ["Making a Field Read-Only" on page 67](#).

- 6 In the Script form, use the GetParameter function to get the script session ID.

For more information on using GetParameter, see the Example eScript for Summary Form section in the *Siebel Employee Relationship Management Administration Guide*.

- 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 the Example eScript for Summary Form section in the *Siebel Employee Relationship Management Administration Guide*.

- 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 8](#) shows the business process used when linking the form and the Inbox.

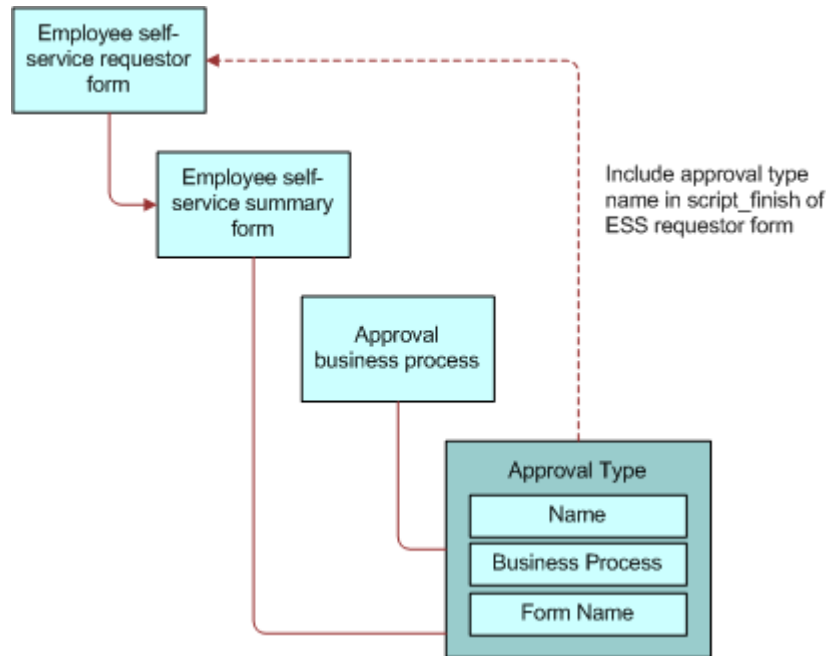


Figure 8. Linking Employee Self-Service Form to Inbox

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 66.

This task is a step in [Process of Setting Up Employee Self-Service](#) on page 60.

### To link employee self-service forms to the Inbox

- 1 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 following script:

```
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 = TheAppl i cati on ().GetServi ce ("Uni versal I nbox");  
svc. InvokeMethod("I ni ti al i ze", i ndata, outdata);  
}
```

- 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:

```
// Approval s I nbox Admi ni strati on screen  
i ndata. SetProperty ("I temType", "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.

## 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 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 the Siebel application Employee Center.

### To link ESS Forms to Request Changes buttons

- 1 Navigate to the Site Map > Administration - Catalog view.
- 2 In the Catalog Administration list, query for Employee Center.
- 3 In the 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.

## Associating ESS Forms with Employee Directory

You can associate Employee Self-Service (ESS) forms with Employee Directory. For more information, see the Linking ESS Forms, Literature, and Solutions to Employee Directory section in the *Siebel Employee Relationship Management Administration Guide*.

## 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 60](#).

#### *To release a script*

- 1 Navigate to the Site Map > Administration - SmartScript > Scripts view.
- 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 77](#).

**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 65](#).

- 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 60](#).

### 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.

# 6

## Setting Up Siebel Projects for HelpDesk

Siebel Projects is a module that provides a shared company workspace. Employees within an organization can use Siebel Projects to 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 79](#)
- [Scenario for Siebel Projects on page 80](#)
- [Process of Setting Up Siebel Projects on page 81](#)
- [Project Activity Templates and Activities on page 82](#)
- [Virtual Collaboration and the Project Center on page 82](#)
- [Project Summary and Project Center Pages on page 84](#)
- [Browsing Projects \(End User\) on page 84](#)
- [Creating Projects \(End User\) on page 85](#)
- [Adding Project Team Members \(End User\) on page 85](#)
- [Creating a Project Activity Plan \(End User\) on page 86](#)
- [Adding a Description to the Project Summary \(End User\) on page 86](#)
- [Updating and Tracking Project Information \(End User\) on page 87](#)
- [Adding Graphics to Project Summary Pages \(End User\) on page 88](#)
- [Adding News Content to a Project \(End User\) on page 88](#)

## Project Collaboration Management

Siebel Projects centralizes key project information including:

- Membership
- Project schedules and milestones
- Activity assignments
- Delivery dates
- Project commentary and notes
- 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 (key performance indicators)
- 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
- 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 every geographic region. The administrator then demonstrates that—after a project is created and staffed—the project lead can develop a plan to complete the project objectives. To create a plan, the project lead selects the marketing rollout activity template from the Projects screen's Activity Plan view. The selected activity template automatically displays the associated activities and completion time frames 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 she creates the project, 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 on 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 82](#). For more information, see *Applications Administration Guide*.
- 2 [Virtual Collaboration and the Project Center on page 82](#). The administrator sets up virtual collaboration within the Siebel application 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 84](#). Administrators use the Microsite Management feature to configure and manage the layouts for the Project Home and 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 84](#)
- 2 [Creating Projects \(End User\) on page 85](#)
- 3 [Adding Project Team Members \(End User\) on page 85](#)
- 4 [Creating a Project Activity Plan \(End User\) on page 86](#)
- 5 [Adding a Description to the Project Summary \(End User\) on page 86](#)
- 6 [Updating and Tracking Project Information \(End User\) on page 87](#)
- 7 [Adding Graphics to Project Summary Pages \(End User\) on page 88](#)
- 8 [Adding News Content to a Project \(End User\) on page 88](#)

## 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 81](#)

## Virtual Collaboration and the Project Center

Siebel Projects allows you to set up virtual collaborations, integrating synchronous, real-time collaboration applications into the Project Center page. Project users can collaborate with each other in real time over the Internet or your organization's intranet. You can integrate Siebel Projects with 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.

## Portal Agents

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*.

## Guidelines for Setting Up Virtual Collaboration

Use the following guidelines to set up virtual collaboration in the Siebel application:

- **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 user interface. Your Siebel application is preconfigured with several fix-up 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 capability 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 corrected (fixed-up) after external HTML content is generated
- **Define Web applications.** Web applications allow multiple Symbolic URLs to send requests to the same Web application and share the same session. This capability 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 81](#)

## Project Summary and Project Center Pages

The Siebel Projects module includes two preconfigured project pages, Project Home and Project Summary, which 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.

### 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 81](#)

## 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 81](#).

#### *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 81](#).

*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 81](#).

*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 81](#).

### *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 82](#).

### *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 81](#).

### *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 After you add the description text, 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 81](#).

### *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, and 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 81](#).

### *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 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 the Setting Up Content Services chapter in the *Siebel Employee Relationship Management Administration Guide*.



## Adding a News Topic

After the appropriate news topics are created, you can add the news topics to your project. Oracle's 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 81](#).

### *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 existing 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 After you add the news topic, click the View Summary button.

The selected news topics appear in the Project News section.



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