SIEBEL EMPLOYEE RELATIONSHIP MANAGEMENT ADMINISTRATION GUIDE

VERSION 7.5, REV. A

12-EE8WRW

JANUARY 2003

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Introduction

This guide explains how to set up and administer Siebel Employee Relationship Management (ERM).

Although job titles and duties at your company might differ from the positions listed in the following table, the audience for this guide consists primarily of employees in these categories.

Compensation Planning Administrator	Persons who administer and manage the Compensation Planning application.
Content Manager	Persons who have access to the Group News Authoring views and who are responsible for authoring and approving news stories.
ERM Group News Administrator	Persons who have access to the Group News Administration views and who are responsible for creating content paths and editing submitted or completed news stories.
HelpDesk Agent	Persons responsible for administrating the Siebel knowledge base, changing the status of Alerts Online, and for setting up Assets Management. Persons with this responsibility have the ability to provide full-level support (Tier 1 and Tier 2).
Human Resources Administrator	Many organizations have Human Resources administrators to assist with creating and maintaining employee profiles. This individual can be responsible for setting up employees and handling employee requests to change profile information.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

To benefit from the configuration sections of this book, you should have an understanding of the Siebel environment, Siebel applications, and the Web environment. You should also feel comfortable working with Siebel Tools.

How This Guide Is Organized

This guide covers general setup and administrative procedures for each Siebel ERM module. Each section explains a Siebel ERM module.

Additional Resources

The following Siebel application guides include information that may be relevant to your use of Siebel Employee Relationship Management:

- For development resources and information, see *Siebel Tools Reference* and *Siebel Tools Online Help*.
- For information about installing Siebel applications or general Siebel parameters, see *Siebel Server Installation Guide for Microsoft Windows*, *Siebel Server Installation Guide for UNIX*, and *Siebel Web Client Administration Guide*.
- For more information about the zero-footprint architecture, see *Siebel Web Client Administration Guide*.
- For more information about configuring Web services and setting up demonstration scripts, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.
- For information about creating Predefined Queries (PDQs), Microsites, D&B reports and services, and other administrative procedures, see *Applications Administration Guide*.
- For more information about responsibilities and visibility rules, see the *Security Guide for Siebel eBusiness Applications*.
- For more information about tracking profiles, see *Siebel eBriefings Administration Guide* .
- For information about course registration, course catalog, curriculum planning, skills testing and certification, see *Siebel eTraining Guide*.
- For more information on Workforce Analytics, see *Siebel Analytics User Guide*.

Revision History

Siebel Employee Relationship Management Administration Guide, Version 7.5, Rev. A

January 2003 Bookshelf

Table 1. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
"Administrator Setup Tasks" on page 46	Revised format for tasks from text to table. Configuration information moved to separate chapter, Chapter 15, "Configuring Siebel ERM."
Business Scenarios	Business scenarios revised, and minor edits throughout book completed.
Example Process sections	Example Process section added for each chapter of the book, with cross-references to procedures.
Procedures order	Order of procedures changed throughout document to reflect process flow.

Overview of Siebel ERM 1

Siebel ERM is an integrated suite of more than 25 Web-based applications designed for use by employees within an organization. This chapter provides an overview of the applications that make up Siebel ERM.

Key Features of Siebel ERM

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

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

Siebel ERM provides the following features:

- **Employee Directory**. Siebel Employee Directory allows users and administrators to manage and view employee profile information. For more information, see Chapter 3, "Setting Up Employee Directory."
- **Competency Management and career planning**. Siebel Competency Management allows employees and managers associate specific skills with job and employee profiles. For more information, see Chapter 5, "Setting Up Competency Management."
- **Objectives and Reviews**. Siebel Objectives and Reviews is used to set employee objectives and assess performance using periodic and annual reviews. For more information, see Chapter 4, "Setting Up Objectives and Reviews."
- **Compensation Planning**. Siebel Compensation Planning is a compensation planning application that allows organizations to plan for merit-based and promotion-based salary increases, cash bonuses, and stock grants. For more information, see Chapter 6, "Setting Up Compensation Planning."
- **Group News**. Siebel Group News allows the organization's authors to create, edit, approve, preview, and publish real-time news content. For more information, see Chapter 8, "Managing Group News."
- **Unified Help Desk**. Siebel HelpDesk allows employees to submit and track service requests using the organization intranet and solve problems by providing access to FAQs and interactive diagnostic tools. For more information, see Chapter 10, "Setting Up Siebel HelpDesk."

- **Employee Self-Service**. Siebel Employee Self-Service (ESS) allows employees to process routine and frequent transactions using the Web. This application provides automated processes that guide users through necessary steps, incorporate relevant data, accept user input, and are automatically routed for processing and approvals. For more information, see Chapter 11, “Setting Up Employee Self-Service.”

- **Unified Approvals Inbox**. The Unified Approvals Inbox allows managers and employees with review tasks to view and act on approval requests from a single unified screen. Approvals Inbox also allows administrators to create and manage approval flows. For more information, see Chapter 12, “Setting Up Unified Approvals Inbox.”

- **Projects**. Siebel Projects provides a shared company workspace that allows employees within an organization, regardless of physical location, to organize, coordinate and manage their formal and ad-hoc project assignments. For more information, see Chapter 13, “Setting Up Siebel Projects.”

- **Microsite Management**. Microsite Management allows administrators to create and maintain Web pages within a Siebel application. For more information about microsites, see *Applications Administration Guide*.

- **Customer Content.** Customer content includes several briefing pages that provide users with important business information about accounts, competitors, and other organizations. For more information, see “ERM Briefing Pages” on page 28.

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

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

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

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

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

- **Briefing pages.** These pages provide employees with a briefing-style summary of important business information about accounts, competitors, and other organizations, and can include recent news, relevant data from the Siebel database, and company profiles provided by Siebel eContent Services.

- **Microsite pages.** These pages provide employees with information, such as corporate announcements, links to literature files, links to HTML files, and other key resources. Microsite pages are flexible, giving administrators the ability to integrate unstructured content on the same page with Siebel data. Siebel ERM ships with several preconfigured Microsite pages, such as the Human Resources page.

Siebel ERM also provides a framework for integrating external content in context with your Siebel application.

Modules and Options

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

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

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

For introductory information on using the Siebel applications standard interface, see Fundamentals and Online Help.

eEvents Management

The Siebel eEvents Management module lets you plan, execute, and evaluate marketing events and set up an eEvents Management Web site where users can learn about and register for events. For more information, see *Siebel eEvents Management Guide*.

eAdvisor

The eAdvisor application is intended for users who need advice and guidance to configure products, create quotes, or purchase products from Siebel Customer and Partner Application Web sites. For more information, see *Siebel Interactive Designer Administration Guide*.

eTraining

Siebel eTraining provides a Learning Management System (LMS) for hosting and managing end-user training throughout an organization. Siebel eTraining provides a Course Registration System, Course Catalog, Curriculum Planning, Skills Testing and Certification System as well as a Training Library. A variety of delivery methods are supported, including Web-based, instructor-led, pre-recorded and virtual classroom training. For more information about setting up or managing eTraining, see *Siebel eTraining Guide*.

Distance Learning and Employee Training

The Siebel Distance Learning module lets users host training sessions, view a list of scheduled training sessions, play recorded presentations, and participate in instructor-led training sessions using corporate intranets or the Internet. For more information, see *Siebel Distance Learning Guide*.

Siebel eTraining provides a Learning Management System (LMS) for hosting and managing end-user training throughout an organization. Siebel eTraining provides a Course Registration System, Course Catalog, Curriculum Planning, Skills Testing and Certification System as well as a Training Library. For more information, see *Siebel eTraining Guide*.

Workforce Analytics

Workforce Analytics allows users to analyze, query, send alerts, and report on data using the HelpDesk, Performance Management, and eTraining modules. For more information on Workforce Analytics, see *Siebel Analytics User Guide*.

The Siebel ERM Environment

Siebel ERM users access the application using a standard Web browser. Siebel ERM accesses servers outside your company’s firewall to provide end users with information from external content providers, such as Siebel eContent Services.

Figure 1 shows the Siebel ERM architecture. The Web browser connects to the Web server. The Web server connects to the Siebel Gateway, which in turn connects to other Siebel servers. The Siebel servers are connected to a database and, through the Internet, to eContent Services.

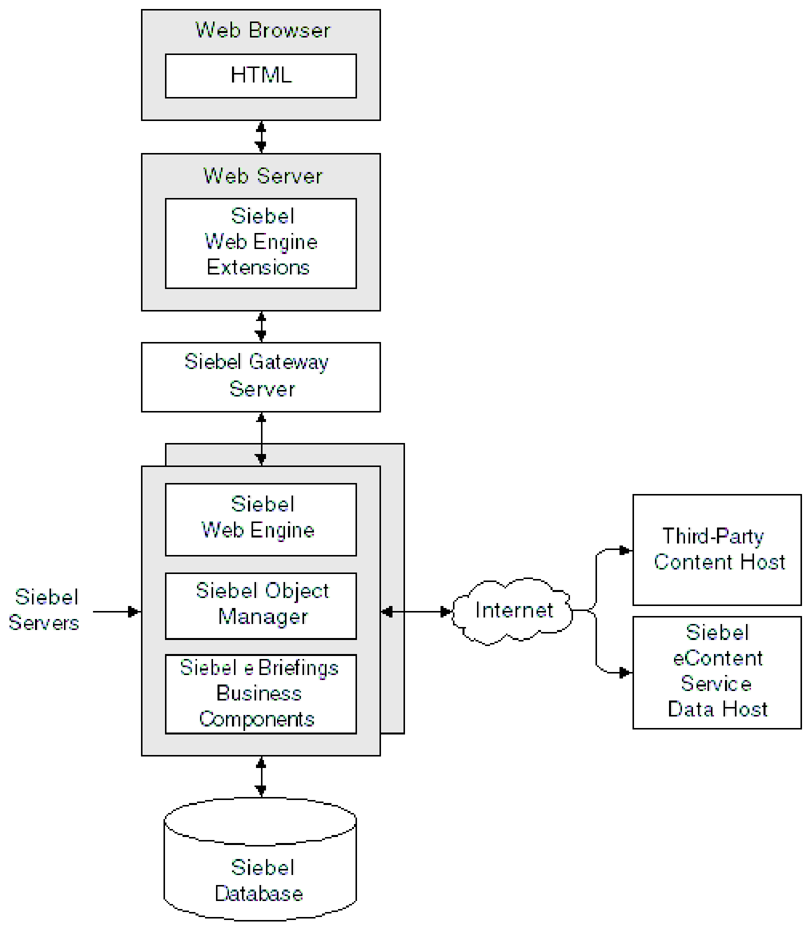

Figure 1. Siebel ERM Architecture

For more information, see *Siebel Web Client Administration Guide*.

Siebel eContent Services

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

Siebel eContent Services includes leading newswires, business magazines, newspapers, and trade journals. It provides news, company profiles, corporate relationship information, market data, and other relevant content that appear in context with your Siebel data. For more information, see Chapter 9, "Setting Up eContent Services."

Siebel ERM Home Page

When users log in to their Siebel ERM application, the first screen that appears is the home page. The home page, a combination of lists and forms, can include service requests, recent news about selected accounts and competitors, news about the organization, a daily calendar, a graphical announcement that you can customize for your organization, and so on.

The ERM home page, shown in Figure 2 on page 23, is personalized for each user. When an employee logs in to the application, a personalized message appears on the home page.

In Figure 2, the Corporate Announcements and My News section appear on the left. On the right, the My Calendar section appears.

Figure 2. ERM Home Page

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

For more information about visibility rules, see the *Security Guide for Siebel eBusiness Applications*. For more information on tracking profiles, see "Using Tracking Profile to Control ERM Home Page Information" on page 40.

Home Page Sections

The internal sections of the home page are described in Table 2. The search and sort specifications for internal sections are defined in the predefined query called Home. For more information about predefined queries, see "Modifying Siebel ERM Predefined Queries" on page 284.

Table 2. ERM Home Page Siebel Data Sections

Section	Description	Controlled by Tracking Profile
Account/ Competitor News	Displays recent news articles specifically relating to an individual user's tracked accounts and competitors. This content only appears if the organization subscribes to Siebel eContent Services.	Yes
Analytics Report	Displays personalized or organization-wide reports from Siebel Analytics.	Yes
Corporate Announcements	Displays links to Web pages, Web pages (appears in-line), or HTML. These records are entered in the Content Layout view with the following attributes: ■ View = Portal Page Home View ■ Page = Home ■ Section = Body For more information on microsite management, see *Applications Administration Guide*.	No
Feature Articles	Displays new stories, Web pages, or HTML. These records are entered in the Content Layout view with the following attributes: ■ View = Portal Page Home View ■ Page = Home ■ Section = Body See "ERM Microsite Pages" on page 38 for more information.	No

Table 2. ERM Home Page Siebel Data Sections

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

Table 2. ERM Home Page Siebel Data Sections

Section	Description	Controlled by Tracking Profile
New Bulletins	Used to alert users of important company announcements. Displays broadcast messages defined in the Administration view. Messages that are created between the activation and expiration dates and designated for Siebel eBriefings appear as bulletins in this section. Messages are sorted by creation date and then by abstract.	No
New Contacts	Displays contacts for whom the user is listed as a secondary user. Contacts are sorted by last name and then by first name.	No
New Service Requests	Displays open service requests associated with the accounts to which the user is assigned and that were created within the data duration date. Service requests are sorted by status, and then by severity.	No
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link and the Web display method is not In-Line.	Yes
Today's Headlines	Displays today's headlines.	No
Top Story	Displays the top story.	No
Weather	Displays a current weather summary for the ZIP code selected on the user's tracking profile.	Yes
Web Clips	Displays the target Web page of a recommended link in-line with other sections. Web clips are recommended links stored in the Siebel Encyclopedia with a Web display method defined as In-Line.	Yes
Web Search	Allows users to search the Internet using leading search engines.	No
Yellow Pages Search	Allows users to locate businesses by address and telephone number.	No

Home Page Sections Containing External Data

Table 3 describes the ERM home page sections that include information from Siebel eContent Services.

Table 3. ERM Home Page External Data Sections

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

ERM Briefing Pages

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

These briefing pages include:

- **Account briefings**. For more information, see "Account Briefings."
- **Competitor briefings**. For more information, see "Competitor Briefings" on page 33.
- **Company briefings**. For more information, see "Company Briefings" on page 35.

Account Briefings

Account Briefings help users prepare for customer calls by keeping them informed about aspects of their accounts. An Account Briefing is a single Web page that summarizes interactions with the customer and includes news and company profile information. It also gives users access to related literature in the Siebel Encyclopedia, such as presentations, brochures, and recommended links.

Users can access Account Briefings from several views. Each view provides the user with a different subset of account records. The views include:

- **My Tracked Accounts.** This view shows the accounts selected by users in their tracking profiles.
- **My Accounts.** This view shows the user's assigned accounts.
- **My Team's Account.** This view shows the user's accounts and accounts for which the primary sales team member is a direct subordinate of the user.
- **All Accounts.** This view shows the accounts to which the user has access based on visibility rules.

NOTE: Access to views is based on each user's responsibilities. Not all users have the views listed in this section. For example, only managers have access to My Team's Accounts. For more information about responsibilities and views, see *Security Guide for Siebel eBusiness Applications*.

Figure 3 shows an example of an Account Briefing. Sample data files have been created for some links and literature items (for example, Web Clips) to illustrate the ways external data is integrated into eBriefings if the application has a live Internet connection using the Siebel eContent datahost. Some links do not appear to work because a sample data file has not been created for that link or list. With a live connection, you can see the way the functionality works after configuring eBriefings to integrate the third-party content you are interested in viewing.

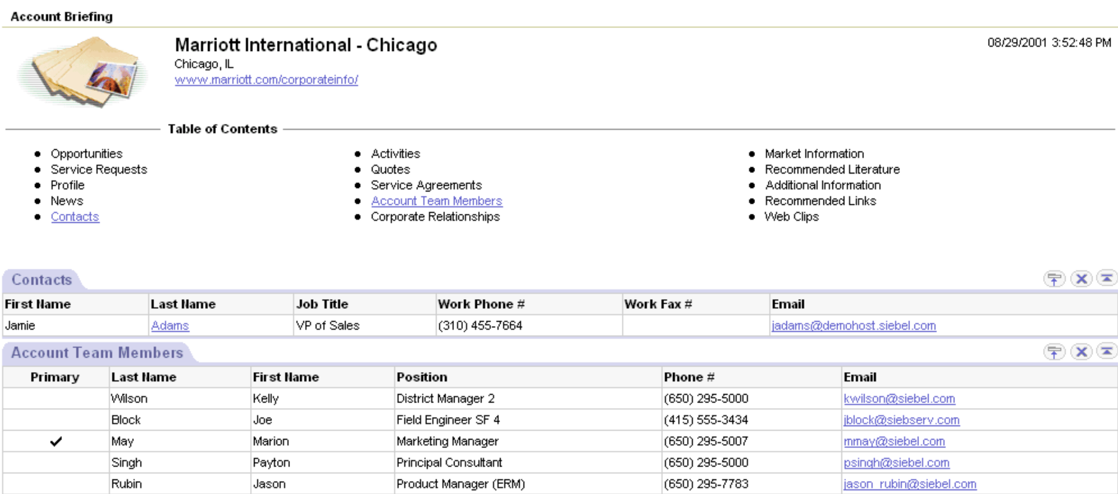

Figure 3. Account Briefing

Account Briefing Sections with Siebel Data

Table 4 describes the Account Briefing sections that include data from your Siebel database. The search and sort specifications for internal sections are defined in the predefined query called Account. For more information about predefined queries, see "Modifying Siebel ERM Predefined Queries" on page 284.

Table 4. Account Briefings Siebel Data Sections

Section	Description
Account Team Members	Displays employees who are on the sales team for the account.
Activities	Displays account activities for the last 30 days. Activities are sorted by type and then description.
Contacts	Displays the contacts related to the account. Contacts are sorted by last name and then first name.
Header	Displays the name of the current company and a link to the company's home page. It also includes an Edit Layout button that allows users to modify the layout of the Account Briefing.
Opportunities	Displays account opportunities created in the last 30 days. Opportunities are sorted by revenue and then by probability percentage, based on the primary user.
Quotes	Displays the quotes related to the account. Quotes are sorted by end date. Quotes that are less than 30 days old appear.
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is not In-Line.
Recommended Literature	Displays links to literature items in the Siebel Encyclopedia related to the account. The current date must be between the release and expiration dates.
Service Agreements	Displays the service agreements related to the account. Service agreements are sorted by end date. Service agreements that are less than 30 days old appear.
Service Requests	Displays the service requests related to the account. Service requests are sorted by status, creation date, and then severity.

Table 4. Account Briefings Siebel Data Sections

Section	Description
Table of Contents	Displays Account Briefing sections. Sections that include available data appear as hyperlinks.
Web Clips	Displays a Web page related to this account in-line with other sections. Web Clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.

Account Briefing Sections with External Data

Table 5 describes the Account Briefing sections that include information from Siebel eContent Services.

Table 5. Account Briefing External Data Sections

Section	Description
Additional Information	Links to stock chart and SEC filings for the account and links to Internet search engines. When users click these links, the search arguments are passed to the target site and a search is automatically performed for information about the current account.
Corporate Relationships	Displays affiliated companies sorted by name.
Market Information	Displays stock information such as the current price, last trade, the net change for the day, trading volume, 52-week high and low, and other market-related data.
News	News about the account from external news wires. The number of articles and duration of news postings can be configured in the Administration view.
Profile	Summary of company data provided by a Siebel eContent Services content provider.

Competitor Briefings

The Competitor Briefing, shown in Figure 4, helps employees stay informed by gathering information about competitors. It provides users with current market information, product information, company information, a list of corporate affiliations, and access to related literature from the Siebel Encyclopedia.

Users access Competitor Briefings using one of the two following views:

- **My Tracked Competitors.** This view shows the accounts selected by users in their tracking profiles.
- **All Competitors.** This view shows accounts to which the user has access based on visibility rules.

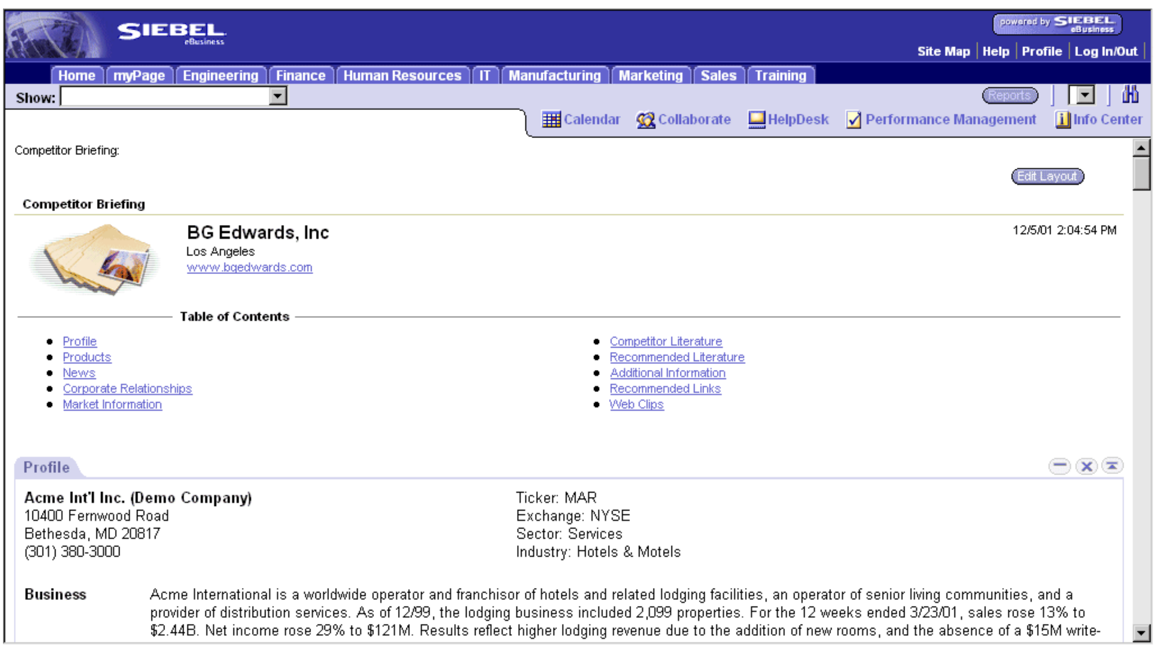

Figure 4. Competitor Briefing

Competitor Briefing Sections with Siebel Data

Table 6 describes the Competitor Briefing sections that display data from the Siebel database. The search and sort specifications for internal sections are defined in the predefined query called Competitor. For more information about predefined queries, see "Modifying Siebel ERM Predefined Queries" on page 284.

Table 6. Competitor Briefing Siebel Data Sections

Section	Description
Competitor Literature	Displays literature from the Siebel Encyclopedia that has been associated with the competitor. Competitor Literature is sorted by sales tool type and then by name.
Products	Displays a list of competitor products sorted by name.
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is not In-Line.
Recommended Literature	Displays links to literature items in the Siebel Encyclopedia related to the competitor. The current date must be between the literature item's release and expiration dates. Literature is sorted by sales tool type and then by name.
Web Clips	Displays a Web page related to this competitor in-line with other sections. Web clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.

Competitor Briefing Sections with External Data

Table 7 describes the Competitor Briefing data sections that include external data from Siebel eContent Services.

Table 7. Competitor Briefing External Data Sections

Section	Description
Additional Information	Links to stock charts, SEC filings, and Internet search engines. When users click these links, the search arguments are passed to the target site and a search is automatically performed.
Corporate Relationships	Displays affiliated companies sorted by name. Users can view Company Briefings for these companies.
Market Information	Displays stock information such as the current price, last trade, the net change for the day, trading volume, 52-week high and low, and other market-related data.
News	Displays recent news related to the competitor from Siebel eContent Services news providers.
Profile	Summary of company data provided by a Siebel eContent Services content provider.

Company Briefings

Siebel eContent Services publishes a database of thousands of public and private companies. Users can get Company Briefings for any of these companies using the Company Search form on the home page, as shown in Figure 5. When a user initiates a query in the Company Search form by specifying company name and search type criteria, matching records from the Siebel eContent Company Database appear in the Search Results section with links to Company Briefings. This allows users to gather information about organizations that are competitors or accounts.

Figure 5. Company Search Form

After the query results are returned, the user can click the name of a company, and a Company Briefing appears, as shown in Figure 6. Company Briefings provide external information about the company (such as news, a company profile, information about corporate affiliates, and links to additional information on the Internet).

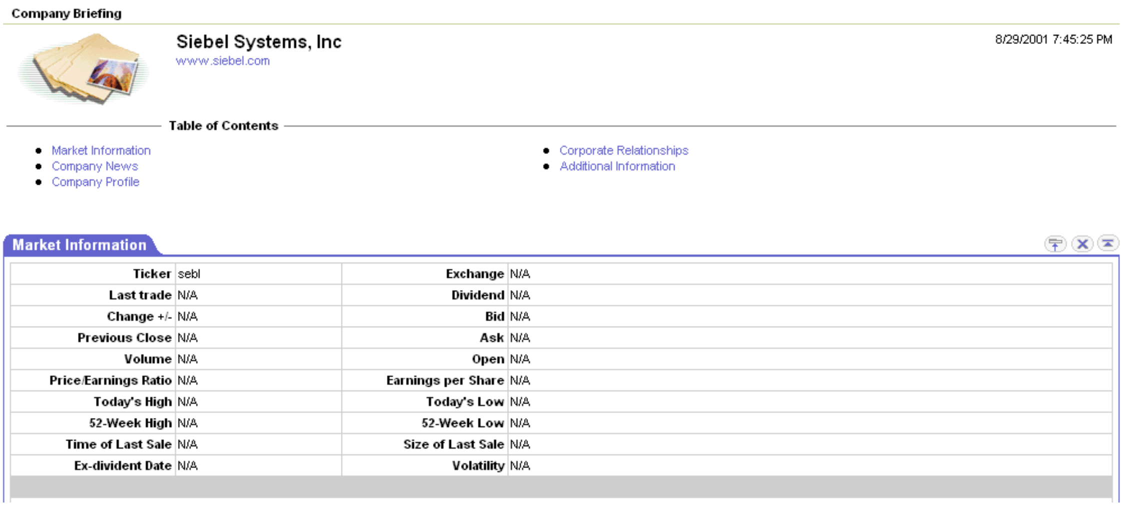

Figure 6. Company Briefing

Company Briefing Sections with External Data

Table 8 describes the external data sections that appear in Company Briefings.

Table 8. Company Briefing External Data Sections

Section	Description
Additional Information	Links to SEC filings for the company and links to Internet search engines or other relevant information. When users click these links, the search criteria are passed to the target site and the search is performed automatically.
Company News	Displays recent news articles related to the company from Siebel eContent Service news providers.
Company Profile	Summary of company data provided by a Siebel eContent Service content provider.
Corporate Relationships	Displays affiliated companies sorted by name.
Market Information	Displays stock information such as the current price, last trade, net change for the day, trading volume, 52-week high and low, and other market related data.

ERM Microsite Pages

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

For more information about microsites, see *Applications Administration Guide*.

Figure 7 shows a sample microsite page for Marketing. As illustrated, the Siebel application can include microsite pages. The illustration shows the Manufacturing microsite that includes several sections on the page. On the left is the Section Map, which includes a list of section links to relevant information. The middle section includes Feature Articles. On the right of the page are the Top Story section and the Quick Picks section, which provide a list of links to other relevant pages and information.

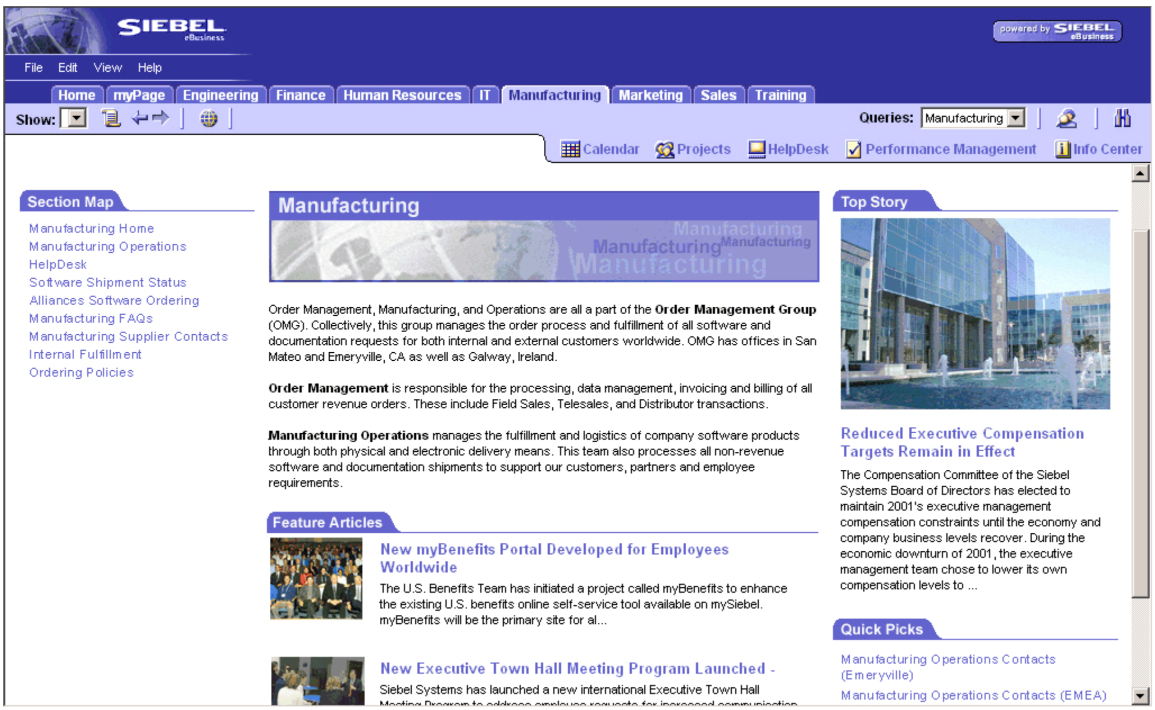

Figure 7. Sample Microsite Page

Using Tracking Profile to Control ERM Home Page Information

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

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

- External and internal news and information about tracked accounts and competitors
- Literature associated with their preferred accounts, products, competitors, and industries
- Market information about selected stocks in the My Stocks section
- Account or competitor briefings from the Tracked Account or Tracked Competitor views

The tracking profile allows users to select:

- Accounts
- Competitors
- Industries
- Products
- News topics

Figure 8 shows the Tracked Accounts list of records. The columns in the list are Account Name, Site, and Web Site.

Users can access their tracking profiles by navigating to the Profile screen.

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

Figure 8. Tracked Accounts

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

For example, Figure 9 shows literature items that might appear based on the tracking profile defined in Figure 8 on page 41.

Figure 9. Literature List

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

- Account/Competitor News
- Literature
- Recommended Links
- Web Clips
- My News

For more information about sections on the home page, see Table 2 on page 24 and Table 3 on page 27.

Page Layout Preferences and ERM Home Page

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

The Content Selection and Layout view, shown in Figure 10, allows users to see the order of lists and forms, and whether the lists and forms are visible or hidden. This view also allows users to show lists or forms, reposition them, and to return the page layout to the default setting. The Content Selection and Layout view appears when you click the Edit Layout button at the top of the ERM home page.

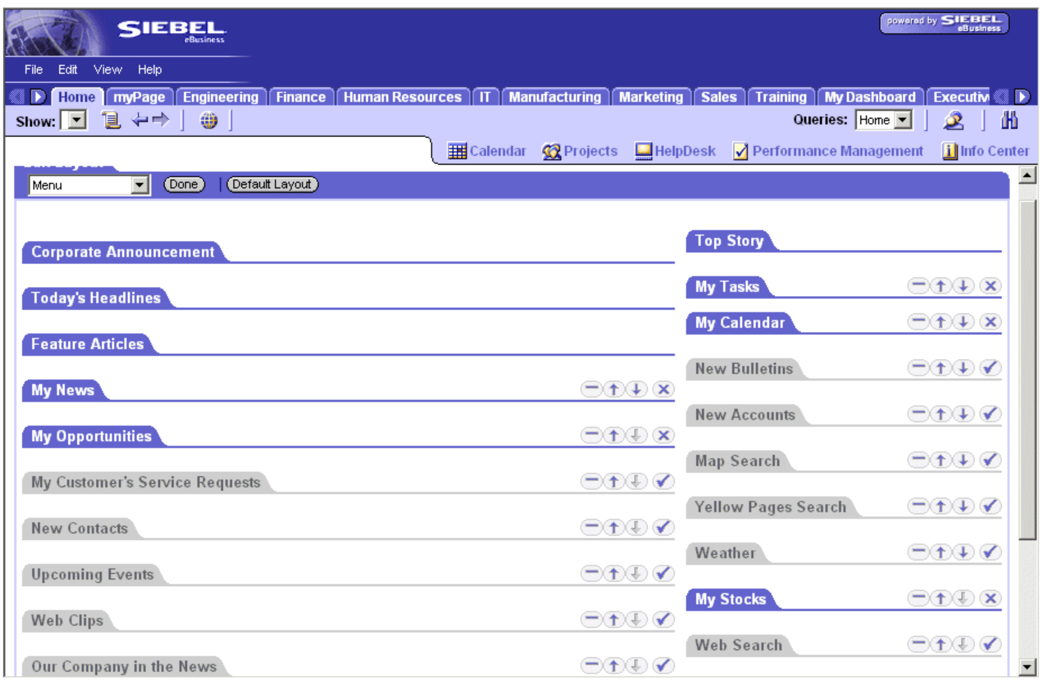

Figure 10. Content Selection and Layout View

Layout preferences are stored as part of the user profile and are independent of the client machine being used. For information about providing layout controls for end users, see "Setting Up Layout Controls for ERM" on page 288.

Bulletins and ERM Home Page

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

For more information about creating Bulletins, see "Publishing Bulletins on ERM Home Page" on page 139.

My Calendar

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

Web Search

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

Siebel Search

Users can search the Siebel database by clicking the small binoculars button in the upper-right area of the ERM window. Table 9 summarizes the data types you can search for and the fields on which you can search.

Table 9. Siebel Search

You can search for...	By entering...	Siebel database searched for...
Accounts	Account name	Accounts in the user's organization
Contacts	Last name	All contacts

Table 9. Siebel Search

You can search for...	By entering...	Siebel database searched for...
Employee by previous employer	First name, last name, industry, previous employer, business title, or business unit	All previous employers entries
Employee by skill	First name, last name, skill name, or skill level	All skill entries
Employees	First name or last name	All employees
Literature	Name, description, or author	All literature in the Siebel Encyclopedia
Objectives	First name or last name	All completed objectives
Opportunities	Name	Entries in My Opportunities
Service requests	Service request number	All service requests in the user's organization
An answer	A question	All solutions, literature, and resolution items

ERM Recommended Links

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

For information on publishing recommended links, see "Publishing Web Clips and Recommended Links" on page 135.

ERM Web Clips

Web clips are static Web pages that appear in ERM. Marketing administrators define and publish Web clips using the Marketing Administration views in the Siebel application. Web clips are stored in the Siebel Encyclopedia as a specialized type of recommended link. For more information, see "Publishing Web Clips and Recommended Links" on page 135.

Getting Started with Siebel ERM 2

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

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

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

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

Administrator Setup Tasks

Table 10 lists and describes the administrative setup tasks that are specific to Siebel ERM. The table also directs you to documentation that provides information about each task.

When setting up your application, use Table 10 in combination with Applications Administration Guide.

Table 10. 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, Siebel Server, Siebel Database Server, and Siebel Web Servers.	Refer to *Siebel Server Installation Guide* for the operating system you are using.
Set up the Application Services Interface (ASI) to synchronize data between ERM and a third-party system. (Optional)	Configure Web Services, activate the Employee ASI Workflow, and set up synchronization between ERM and the third-party system.	Chapter 16, "Setting Up an Application Services Interface."
Configure ERM for the GUESTERM user.	This user ID verifies that each user logging in to Siebel ERM sees the proper Home Page with the correct page tab.	"Configuring Siebel ERM for GUESTRM User" on page 282
Activate user layout control	Activate the home page controls that allow users to change ERM home page layout.	"Setting Up Layout Controls for ERM" on page 288
Verify plug-ins and viewers	Plug-ins and viewers make it possible for users to access and work with files created using a software application such as Microsoft Word or Adobe Acrobat when the full software application is not installed on the user computer.	Verify that your users have the plug-ins and viewers necessary to work with the file types they need to access while working in Siebel ERM and Siebel eBusiness Applications.

Table 10. Administrative Setup Tasks

Administrative Task	Description	For More Information
Modify Siebel ERM Predefined Queries (Optional)	Siebel ERM is preconfigured with several PDQs that administrators can modify.	"Modifying Siebel ERM Predefined Queries" on page 284.
Set up D&B user credentials	If your organization is using D&B, you must set up the credentials that allow users to access reports.	"Establishing D&B User Credentials for ERM" on page 286.

3 Setting Up Employee Directory

The Siebel Employee Directory is a Siebel ERM module that allows users and administrators to manage and view employee profile information. This section describes the Employee Directory feature and explains how to set up and manage employee profiles.

Managing Information with Employee Directory

Siebel Employee Directory has two key areas of functionality, Employee Profile and Employee Locator.

Employee Profile

Siebel Employee Directory uses an employee profile repository to store information about each employee in an organization. An employee's profile includes the following types of information:

- **Bio**. The Bio view allows employees in an organization to enter short biographical information about themselves. This information is then made visible within the Siebel Employee Directory. The biography can help employees better understand the background of their co-workers.
- **Credentials**. The Credentials view allows you to display and manage the credentials associated with an employee. The credentials data is structured and includes the following types of information about an employee:
  - Memberships
  - Honors and awards
  - Certifications
- **Resume**. The Resume view allows you to view and manage the resume of each employee in an organization. Visibility to resumes can be limited by the administrator to select groups of employees. The resume data is structured and includes two elements:
  - Education
  - Past work experience
- **Profile**. The Profile view allows you to view and manage an employee's details, such as name, manager, and address.
- **Skills**. The Skills view allows you to manage and view an employee's skills. Managers can use this view to track skills gaps and build teams based on project skill needs.

The Employee Directory includes several additional views, from which you can manage employee-related information. The following tabs appear in the Employee Directory:

- Calendar
- Objectives
- Training
- Service Request
- Projects
- Activities
- Opportunities
- Customers
- Accounts

For more information about these view tabs, see *Applications Administration Guide*.

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

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

Table 11 describes the views available in the Employee Directory screen.

Table 11. Employee Directory Views

View	Comments
All Employees	Lists employees within the selected organizations.
All Employees Across Organizations	Lists the employees for all organizations.

Table 11. Employee Directory Views

View	Comments
All Users	Lists users and associated responsibilities.
My Profile	Lists the personal profile view for an employee.
My Team	Lists employees associated with a project.

Employee Locator

Employee Locator can be used to find employees based on the employee's profile data. You can base an employee search on the following types of employee profile information:

- Employee details
- Skills
- Previous employment

For more information about using the search feature, see *Fundamentals*.

Business Scenario for Employee Directory

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

Administrator

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

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

Employee Administrator

The software company has hired a number of programmers. The HR employee administrator has been asked to set up the profiles for each employee and save their pictures with their profiles. The administrator already has a digital picture of each employee stored on the network for use as security badge photos. Using Siebel Employee Directory, the employee administrator creates a profile for each employee. She also adds the security badge picture to the profile and makes sure to make them visible so that other users can see the images in the Employee Locator.

Employee

As soon as the employee profiles are entered, the new employees begin updating their profile information as needed in the My Profile view.

Example Process for Employee Directory

The following section describes the process administrators might follow to set up Employee Directory, and the process an end user might follow to use Employee Directory. Your company may follow a different process according to its business requirements.

Administrator Procedure

The Siebel administrator requires administrative responsibilities to:

- **Set up the Employee Administrator.** The administrator creates the Employee Administrator responsibility, and then assigns the employee to the responsibility. For more information, see "Setting Up the Employee Administrator" on page 55 and *Security Guide for Siebel eBusiness Applications*.

Employee Administrator Procedures

The employee administrator is assigned the responsibility that allows the employee administrator to:

1. **Set up and modify employee profiles.** For more information, see "Setting Up and Modifying an Employee Profile" on page 56.
2. **Add an employee picture to each profile.** The employee administrator adds the image files as a literature item, and then associates each employee image with an employee profile. For more information, see "Adding an Employee Picture to a Profile" on page 57.

End-User Procedures

The end user, an employee, uses Employee Directory to:

1. **Update employee profile.** The end user accesses the employee profile to add or update basic information. For more information, see "Updating a User Profile (End User)" on page 59.
2. **Use employee locator.** The end user uses the employee locator to review contact information about a co-worker on a project. For more information, see "Finding Employees Using Employee Locator (End User)" on page 60.

Setting Up the Employee Administrator

Before an HR employee administrator can work with employee profiles in the Siebel ERM application, the employee must be associated with the appropriate responsibilities. You can assign employees additional responsibilities that allow them to administer employee profiles.

To set up an employee administrator, first create a responsibility that provides access to the Employee Administration screen, and then associate the responsibility with the appropriate employee. For more information on creating employee responsibilities, see *Security Guide for Siebel eBusiness Applications***.**

Setting Up and Modifying an Employee Profile

As an administrator, you manage employee profiles by adding employees, and then associating positions, responsibilities, organizations, territories, skills, credentials, and a resume with each employee. You can also edit and omit information associated with an employee profile.

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

To modify an employee profile

1. From the application-level menu, choose View > Site Map > Employee Administration > Employees.
2. In the Employees list, query to find the employee profile you want.
3. Select the employee profile, and then modify the profile.

Adding an Employee Picture to a Profile

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

- BMP
- JPG
- GIF

To add an employee picture as a literature file

1. From the application-level menu, choose View > Site Map > Portal Administration > Literature.
2. In the Literature list, add a new record, and then complete the name and description fields.

   TIP: To help later identify the literature item as an employee picture, use a naming convention that makes use of an employee's user ID or another employee detail.

3. In the new record, click the select button in the File Name field, and in Add Attachment dialog box, click the Browse button.
4. In the Choose file window, select the image, and then click Open.
5. In the Add Attachment dialog box, click Add.

   The file name appears in the File Name field, and the associated fields are automatically populated. A copy of the image is added to the Siebel File System.

6. In the More Info form, select the Internal check box.

To associate the image with an employee

1. From the application-level menu, choose View > Site Map > Employee Administration > Employees.

2 In the Employees list, select the employee, and in the More Info form, click the select button in the Image File Name field.

3 In the Employee Image dialog box, query for the image you saved as a literature item, select the image, and then click OK.

4 In the More Info form, select the Include Image check box.

NOTE: In the My Profile view, employees can choose to exclude or include the picture in their profile.

Updating a User Profile (End User)

Users can update their profiles from the Employee Directory screen.

To update an employee profile

1. Navigate to the Employee Directory screen, and from the Show drop-down list, select My Profile.
2. In the Employee Profile form, click the show more button.
3. Update and add information to the fields as needed.

For more information about working with employee data, see *Fundamentals*.

Finding Employees Using Employee Locator (End User)

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

- Employee details
- Skills
- Previous employment

For more information about using the search feature, see *Fundamentals*.

Setting Up Objectives and Reviews 4

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

Objectives and Reviews includes the following features:

- Employee and corporate objectives management
- Cascading objectives
- Objectives templates
- Periodic and annual performance reviews
- 360-degree evaluations
- Skills assessments and training plans

Business Scenario for Objectives and Reviews

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

Administrator

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

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

Example Process for Objectives and Reviews

The following section describes the process an administrator might follow to set up objectives and reviews. Your company may follow a different process according to its business requirements.

Administrator Procedures

The Siebel administrator requires administrative responsibilities to perform the following Objectives and Reviews tasks:

1. **Define rating scale.** The administrator sets up a rating scale to help managers evaluate employee progress on objectives and skills. For more information, see "Defining a Rating Scale with Rating Values" on page 65.
2. **Define review periods.** The administrator defines review periods and rollups of periodic reviews. For more information, see "Defining Review Periods and Rollups" on page 67.
3. **Define review components.** The administrator defines the components of the review, which may include employee objectives, and skills assessments. For more information, see "Defining Review Components" on page 69.
4. **Create objectives templates.** The administrator creates objectives templates, which allow organizations to distribute predefined objectives. For more information, see "Creating Objectives Templates" on page 72.
5. **Define evaluation forms.** The administrator defines 360-degree evaluation forms using Siebel SmartScript. For more information, see "Defining 360-Degree Evaluation Forms" on page 73.
6. **Create review definitions.** The administrator creates review definitions which include the review type, required approval levels, and review components. For more information, see "Creating Review Definitions" on page 75.
7. **Manage objectives and reviews by organizations.** The administrator sets up different objectives and review periods for each organization. For more information, see "Managing Objectives and Reviews by Organization" on page 78.
8. **Publish corporate objectives.** The administrator publishes the corporate objectives to the ERM Corporate Objectives view. For more information, see "Publishing Corporate Objectives" on page 80.

9. **Update objectives and reviews.** The administrator periodically updates the status and details of an employee’s objectives and reviews. For more information, see “Updating Objectives and Reviews” on page 81.

10. **Manage all-employees objectives hierarchy.** The administrator structures and manages the objectives hierarchy, which shows the relationship between an employee's position and the parent position. The hierarchy controls the approval routing for objectives and reviews. For more information, see “Managing the All-Employee Objective Hierarchy” on page 84.

Defining a Rating Scale with Rating Values

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

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

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

To define a rating scale

1. From the application-level menu, choose View > Site Map > Performance Management Administration > Rating Scales.
2. In the Rating Scales list, add a new record, and then complete the fields.

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

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

To create rating values for the rating scale

1. In the Rating Scales list, select the rating scale record.

2 In the Ratings List, add a new record, and then complete the fields.

TIP: Click Query to search for an existing rating record.

The following table describes the fields in the rating record.

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

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

Defining Review Periods and Rollups

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

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

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

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

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

To change the rollup period type of a review period

1. From the application-level menu, choose View > Site Map > Performance Management Administration > Review Periods.

2 In the Review Periods list, select the record you want to edit, and then choose a value in the Rollup Period Type field.

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

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

Defining Review Components

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

You can define review components using the Review Components view. After review components are defined, the components are associated with review definitions and are accessible to users during the objectives and review processes. For more information, see "Creating Review Definitions" on page 75.

You can also translate review component display names, such as tabs, into other languages. For more information, see "Translating Review Component Display Names" on page 71.

To create a review component

1. From the application-level menu, choose View > Site Map > Performance Management Administration > Review Components.

2 In the Review Components list, add a new record, and then complete the fields.

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

Field	Comments
Type	Specify the type of review component, choosing from the following options. ■ Individual Objective 1-5. Objectives that are defined by individual employees. These objectives should only be used within a periodic review definition. ■ Shared Objective 1-5. Objectives that are predefined by the organization. These objectives not editable by the employee. The review component can be used within a periodic or annual review definition. ■ Rollup. Includes the average of previous periodic review ratings in the overall review rating. ■ Skills. Assessment of employee skills that automatically updates the employee competencies within Competency Management when the review is approved. Skills assessment can be used within a periodic or annual review definition. ■ Training Plan. Displays training course enrollments from the eTraining module. This review component can be used within a periodic or annual review definition. ■ 360 Degree Evaluation. 360 degree evaluations can be used within a periodic or annual review definition.
Name	Enter a descriptive name.
Default Display	Specify the display name of the component tab as it appears to the user.
Effective Date	Specify the start date for the review component. This is the date on which the review component becomes active.
Active	A check mark indicates the review component is active.

Translating Review Component Display Names

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

To define display translations

1. From the application-level menu, choose View > Site Map > Performance Management Administration > Review Components.
2. In the Review Components list select the review component, and then click the Display Translation view tab.
3. In the Display Translation list, add a new record, and then click the select button in the Language field.
4. In the Pick Language Name dialog box select the desired language, and then click OK.
5. In the Display field, enter the translated text for the review component display name, and then click Save.

Creating Objectives Templates

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

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

To create an objectives template

1. From the application-level menu, choose View > Site Map > Performance Management Administration > Review Components.
2. In the Review Components list select the review component, and then click the Objectives Template view tab.

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

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

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

Field	Comments
Name	Enter a name for the objective template.
Description	Enter a description.
Sequence	Enter the sequence of the objective.
Weight	Enter the weight of the objective. Weights for an objective template with a review component type Shared Objective should always add up to 100.

4. When you have finished defining the objectives template, click Save.

Defining 360-Degree Evaluation Forms

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

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

To define evaluation forms

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

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

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

Field	Comments
Type	Select one of the following as the type of 360-degree evaluation. Manager. The evaluator is the superior to the employee that is being evaluated (downward evaluation). Subordinate. The evaluator is the subordinate of the employee that is being evaluated (upward evaluation). Peer. The evaluator is a peer of the employee that is being evaluated (peer evaluations). Colleague. The employee that is being evaluated is a colleague of the evaluator.
Form	Click the select button to choose the SmartScript that is used as the 360-degree evaluation form for the 360 degree evaluation type. The Pick SmartScript dialog box only lists SmartScripts with a 360 Evaluation type of SmartScripts.

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

Figure 11 shows the Evaluation Forms list including peer, colleague, subordinate, and manager evaluation types.

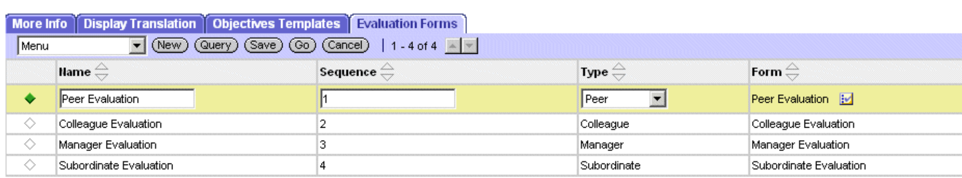

Figure 11. Evaluation Forms List

Creating Review Definitions

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

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

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

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

To create a review definition

1. From the application-level menu, choose View > Site Map > Performance Management Administration > Review Definitions.

2 In the Review Definitions list, add a new record, and then complete the fields.

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

Field	Comments
Review Type	Specify the type of review. For a periodic review, the type must be Periodic Review. For an annual review, the review type must be annual review.
Name	Enter a name for the review definition.
Description	Enter a description of the review definition.
Organization	Click the select button and choose the organization for which the review definition is defined.
Period Type	Choose the period type for the review. For example, to create an annual review, set the period type to Year. To create a quarterly review, set the period type to Quarter.
Sequence	Enter the sequence of the review definition. If more than one review definition with the same Period Type exists for an organization, the review definition with the highest sequence number applies.
Objectives Approval Levels	Specify the level of management approval required for periodic reviews. Options are 0, 1, or 2. These values correspond to the number of managers who must review and approve an employee's periodic review.
Review Approval Levels	Specify the level of management approval required for annual reviews. Options are 0, 1, or 2. These values correspond to the number of managers who must review and approve an employee's annual review.
Minimum 360 Evaluators	Minimum number of 360-degree evaluators that can be selected by an employee. If an employee submits a list of 360- degree evaluators with fewer than the minimum number, an error message appears.
Maximum 360 Evaluators	Maximum number of 360-degree evaluators that can be selected by an employee. If an employee submits a list of 360- degree evaluators exceeding the maximum number, an error message appears.

Field	Comments
Effective Date	Specify the start date for the review definition. This is the date on which the review definition becomes active.
Active	A check mark indicates the review definition is active.
Effective Date	Effective date of the review definition.
Name	Name of the review component.
Component Type	Type of review component.
Rating Scale	Select the rating scale to be used when a manager assesses an employee's performance. Rating scales should only be defined for Individual Objectives and Shared Objectives component types.
Weight	Assign a weight for the review component. The weight determines how much the component contributes to the overall review score. Weights should only be defined for Individual Objectives, Shared Objectives, and Rollup component types.

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

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

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

Managing Objectives and Reviews by Organization

Siebel Objectives and Reviews allows the objectives and review periods to differ by organization. For example, Organization A might have semiannual objectives and reviews and Organization B might have quarterly objectives and reviews.

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

To manage organizations for Objectives and Reviews

1. From the application-level menu, choose View > Site Map > Group Administration > Organizations.
2. In the Organizations list, select the organization to modify.
3. In the More Info form, click the show more button to expose additional fields.
4. Complete the fields to configure the organization setting.

   The following table describes the fields in the organization record.

Field	Comments
Current Objectives Period	Specify the name of the current objectives period. This name identifies which objectives period appears in the Performance Management Dashboard, All Employees Objectives and My Team’s Objectives views. This value should match a value in the Name field in the Review Period Administration view.
Current Review Period	Specify the name of the review period. This name identifies which review period appears in the Performance Management Dashboard. This value should match the Name field value in the Review Period Administration view.

Field	Comments
Annual Review Start Offset	Specify the number of days before an employee's Next Annual Review that the annual review link is active in the Performance Management Dashboard. A value of -N specifies that the annual review link is active N days before the employee's next annual review date.
Annual Review End Offset	Specify the number of days before an employee's Next Annual Review that the annual review link on the Performance Management Dashboard remains active. A value of +N specifies that the annual review link remains active N days after the employee's next annual review date.

Publishing Corporate Objectives

Publishing corporate objectives to the ERM Corporate Objectives view is administered using Siebel Microsite pages. For more information, see "ERM Microsite Pages" on page 38 and the *Applications Administration Guide*.

Updating Objectives and Reviews

When necessary, you can update the status and details (including ratings and comments) for any employee's objectives and reviews. For example, you can override the status of an employee's review if it was mistakenly submitted. Because of the sensitivity of employee review data, it is recommended that access to the All Employees Performance view is only granted to authorized personnel.

To override review status

1. From the application-level menu, choose View > Site Map > Performance Management Administration > All Employees Performance.
2. In the All Employees Performance list, locate the employee whose objective or review status you plan to update, and then drill down on the Last Name hyperlink in the record.
3. In the Employee list of records, select the review record to be updated.

4 In the review record change the Objective Status or Review Status as desired, and then click Save.

The following table provides status information associated with objectives.

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

The following table provides status information associated with reviews.

Review Status	Comments
Not Started	The employee has not started the self-review.
Employee in Progress	The employee has begun the self-review.
Employee Submitted	The employee has submitted the self-review to the manager. The manager is responsible for completing the review.
Manager in Progress	The manager is in the process of completing the review.

Review Status	Comments
Manager Declined	The manager has declined the employee’s self-review. The self-review is accessible to the employee.
Manager Approved	The review has been approved the manager and is awaiting approval by the next-level manager. This status is only valid when reviews require two levels of manager approval.
2nd Manager in Progress	The next-level manager is in the process of completing the review.
2nd Manager Declined	The next-level manager has declined the review. The review is accessible by the manager.
2nd Manager Approved	The next level manager has approved the review. The review is ready for release to the employee by the manager.
Completed	The review has received all necessary approvals and is released to the employee for acknowledgement.
Acknowledged	The completed review has been acknowledged by the employee.
Not Required	The review is not required. Reviews that are not required are counted in the Department Status Report.
Evaluator List in Progress	The employee is in the process of completing the list of 360-degree evaluators.
Evaluator List Submitted	The list of 360-degree evaluators has been submitted for approval by the employee.
Evaluator List Approved	The list of 360 degree evaluators has been approved by the manager. Links to the 360-degree evaluation appear on the evaluator’s Performance Management Dashboard, and the employee can begin the self-review.
Evaluator List Declined	The list of 360-degree evaluators has been declined by the manager and is accessible to the employee.

Managing the All-Employee Objective Hierarchy

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

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

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

Setting Up Competency Management 5

Siebel Competency Management is a Siebel module that is used by managers to associate specific skills with job profiles, by training administrators to associate specific skills with training objectives, and by employees to associate specific skills with their employee profile. This chapter describes setting up and managing competencies.

Using Competencies to Measure Skills and Achievements

Your Siebel application saves employee information within groups of records. Combined, these records make up an employee profile. An employee profile includes information that identifies an employee, such as name, address, manager, and phone number. Also included in an employee profile are sets of skills and abilities that are associated with an employee. These sets of abilities, called *competencies*, are determined by tests or ratings and the stored in your Siebel application. The following competencies are used within CMS to help measure the abilities and achievements of employees:

- **Skills.** Skills are attributes that are measurable using proficiency levels. Skills may include language proficiency, a business proficiency such as project management, and technical proficiency such as programming knowledge.
- **Credentials.** Credentials can include qualifications, honors, rewards, and past education.
- **Experience.** Experience can include past work, industry and project experience.
- **Other relevant competencies.** Other competencies can include personal traits such as leadership, business acumen, decision-making experience, personal traits, communication skills, and so on.

These competencies are used across various modules within a Siebel application:

- **Training and Development**. Skills and competencies are associated with courses and classes offered through your Siebel eTraining application. When employees successfully complete a course, their profiles are automatically updated with the skills associated with the course.
- **Career Management**. The Career Management feature allows employees to view their job profiles, browse potential career paths and define their next career step. The skills associated with an employee's profile are compared to the skills associated with jobs in the employee's career path. The Competency Management feature calculates the skills gaps that exist between an employee and other job profiles. The skill gap analysis indicates skill deficiencies and provides employees with indications of which skills they need to acquire.
- **Team Competency Planning**. The Siebel Competency Management feature provides managers with the ability to manage competencies and skills within their groups. Managers can analyze their team's current skill-set, the required skill-set based on the employee's job profile, and can view individual competency profiles of team members. The skill gap analysis of a team's current strengths and weaknesses allows managers to provide training suggestions or define future hiring requirements. Managers can set competency objectives and monitor employee progression towards these goals.
- **Organizational Planning / Strategic Headcount Management**. Managers can review the level of competency in their organization and identify strengths and areas of vulnerability using the skills gap analysis provided by the Competency Management feature.
- **Performance Management**. Competencies can be included in the formal performance management process. Employees can include specific competencies in their performance setting process and managers can review and access these ratings as part of the overall assessment process.
- **Compensation and Rewards**. Competencies can be associated with employee performance. Managers can review and evaluate employee performance periodically and annually. Based on the evaluation, an employee can be recommended for specific compensation and rewards.

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

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

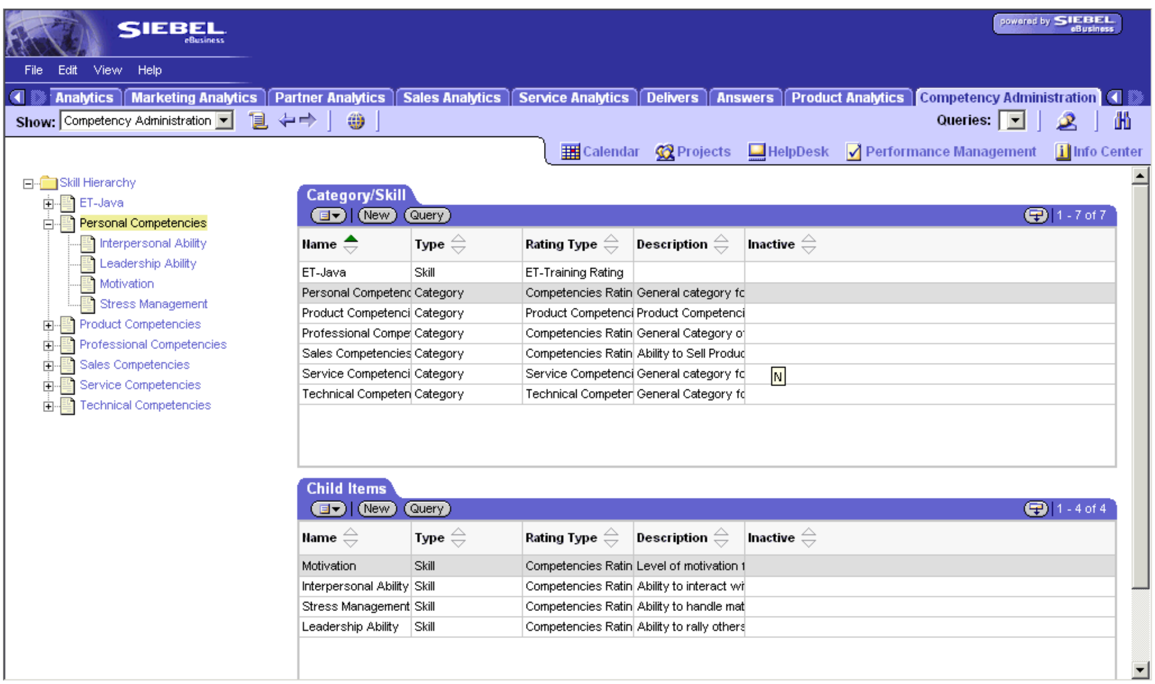

Figure 12. Competency Management Hierarchy

Using the Competency Administration screen, you can perform the following procedures:

- Review existing skills and categories
- Create and edit skills categories
- Create, edit, and copy unique skills
- Assign skills to categories
- Assign rating types to skills
- Deactivate and activate skills
- Provide a default skills set library

Business Scenario for Competency Management

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

Administrator

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

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

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

Example Process for Competency Management

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

Administrator Procedures

The Siebel administrator requires administrative responsibilities to perform the following competency management procedures:

1. **Review the skills library.** The administrator searches the skills library for applicable skills and categories that can be used as-is, or modified. For more information, see "Reviewing Skills and Categories" on page 92.

2. **Create skills.** The administrator creates new skills and edits existing skills to meet requirements. For more information, see "Creating and Modifying a Skill" on page 93.

3. **Create categories for grouped skills.** The administrator sets up categories to logically group related skills. For more information, see "Creating Categories for Grouped Skills" on page 95.

4. **Create job profiles**. The administrator creates job profiles that define the purpose, responsibilities, and requirements of a specific job. For more information, see "Creating Job Profiles" on page 97.

5. **Associate job profiles with skills.** The administrator associates job profiles with specific skills, which creates competencies. For more information, see "Associating a Job Profiles with Competencies" on page 99.

6. **Set up career path options.** The administrator links job profiles to create career paths. For more information, see "Creating Career Path Options" on page 100.

Reviewing Skills and Categories

Your Siebel application is preconfigured to include the skills and categories that are typically used by human resource administrators. Before adding a new skill or category you should query the skills library to determine whether the skill or category you need already exists.

To access the skills library

1. From the application-level menu, choose View > Site Map > Competency Administration > Competency Administration.
2. In the Skill Hierarchy explorer, select a parent category.
3. In the Category/Skill list, query to find the skill or category you want.

   If the skill or category you need does not exist, you can create it. For more information about creating a skill, see "Creating and Modifying a Skill" on page 93.

You can associate an existing skill or category with more than one category at a time. For example, you can have multiple categories that include the same skill. The presentation skill can be included in the Training category and it can also be included in the Sales category.

Creating and Modifying a Skill

A skill is a specific asset that an employee possesses or desires. For example, Oracle DBA, Presentation Skills, Leadership Ability, and Siebel ERM Administration are valid skills that an employee can possess. Some skills are subjective and are based more on the judgment or discretion of a manager. Other skills are objective and are based on an employee's successful completion of specific goals. Administrators can create the skills that are used for competency management.

NOTE: You cannot create a skill using the name of an existing skill. Skill names must be unique within your Siebel application. You can, however, associate the same skill with multiple categories.

To create a skill

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

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

Editing a Skill

When you edit a skill, the changes you make affect each category that includes the modified skill. For example, Presentation Skill can exist within the Training Category and the Power Point Category. If you make changes to the Presentation Skill within the Training Category, the same changes appear in the Presentation Skill within the Power Point Category.

To edit a skill or category

1. From the application-level menu choose View > Site Map > Competency Administration > Competency Administration.

2 In the Skill Hierarchy explorer, navigate to a category or skill to edit, and then edit the fields as needed.

   The changes you make to a skill or category affect each occurrence of the selected item within Competency Management.

Deactivating a Skill

You can deactivate a category or skill to make it unavailable to employees.

To deactivate a category or skill

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

Creating Categories for Grouped Skills

After you have identified the additional skills and categories that are required for your competency management system, you can add them from the Competency Administration screen.

NOTE: If the rating scale you want to use does not already exist, you can create it. For more information on creating a rating scale, see Chapter 4, “Setting Up Objectives and Reviews.”

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

To create a new category

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

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

Field	Comments
Description	Enter a brief description about this category or skill.
Inactive	A check mark indicates that a category or skill is inactive. Inactivating or activating a root category does affect the subcategories and skills within the category.
Name	The name of the category or skill.
Rating Type	Select the appropriate rating type.
Type	Select Category or Skill to indicate the type of record you are creating.

To create a child category

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

Creating Job Profiles

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

Siebel ERM compares an employee's skill levels with the skill levels associated with a specific job profile. The skills associated with a job profile can also be used during performance management to help determine whether an employee meets the job requirements. The Human Resources department can use the required competencies to determine whether job applicants meet the minimum requirements for an open position. It is important to associate the appropriate skills and minimum skill levels with job profiles so that employees, managers, and administrators can integrate skills analysis and management across the entire work force.

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

To create a job profile, the relevant job code, job family, salary grade, EEO Category, and FLSA must already exist. For more information on creating job codes, job families, and salary grades, see Chapter 6, "Setting Up Compensation Planning."

To create a job profile

1. From the application-level menu, choose View > Site Map > Competency Administration > Job Profile Administration.

   NOTE: Before you create a new job profile, make sure the job profile you want to create does not already exist. Query the Job Profile list using the name of the job profile you want to create. If no records are returned, you can create the new job profile.

2 In the Job Profile list, add a new record, and then complete the fields.

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

Field	Comments
Essential Functions	A brief description of job duties and functions.
Job Code	The job code associated with the job profile. The Job Code Name and the Job Family fields are automatically populated based on the job code.
Job Profile Name	The name of the job profile.
Main Purpose	Description of the job's main purpose.
Total Number of Reports	Specify the total number of reports.
Travel	Indicate the percentage of time spent away from the home office.

Associating a Job Profiles with Competencies

After the appropriate job profiles and competencies are created, you can associate these two types of records with one another. A job profile can be associated with multiple competencies. A competency can also be associated with multiple job profiles.

To associate a job profile with a competency

1. From the application-level menu, choose View > Site Map > Competency Administration > Job Profile Administration.
2. Click the Required Competencies view tab, and in the Required Competencies list, add a new record.
3. In the new record, click the select button in the Name field.
4. In the Skills list, query for the skill you want to associate with the job profile, and then click OK.
5. From the Required Level drop-down list, select a competency level of the skill required for the job profile.

   For example, if you are associating a product knowledge competency with a Receptionist job profile, you can require a lower level than you would if you were setting up the Customer Support Specialist job profile.
6. From the Criticality drop-down list, select a rating that indicates the importance of the selected skill for the job profile.

Creating Career Path Options

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

To create a career path option

1. From the application-level menu, choose View > Site Map > Competency Administration > Job Profile Administration.
2. Click the Career Path Options view tab.
3. In the Career Path Options list, add a new record.
4. In the new record, click the select button in the Name field.
5. In the Job Profiles list, query to find the job profile you want to designate as a valid career option, and then click OK.

NOTE: The primary flag indicates the default career option for currently selected job profile.

Setting Up Compensation Planning 6

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

Siebel Compensation Planning provides the following features:

- Planning for merits, promotions, bonuses, and stock
- Budget management
- Compensation guidelines
- Eligibility rules
- Automatic and manual rollups
- Support for multiple currencies
- Charts

Business Scenario for Compensation Planning

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

Administrator

A compensation administrator uses the guidelines provided by his organization to structure the company's employee and financial information as part of the compensation planning process.

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

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

Example Process for Compensation Planning

The following section describe the process an administrator might follow to set up compensation planning. Your company may follow a different process according to its business requirements.

Administrator Procedures

The Siebel administrator requires administrative responsibilities to:

1. **Create salary grades and associated salary plans.** The administrator creates salary grades as the first step in establishing salary ranges within the organization, and then the administrator creates salary plans to define the salary range for each salary grade. For more information, see "Creating a Salary Grade" on page 105, and "Creating a Salary Plan" on page 106.

2. **Create job families and job codes.** The administrator defines families to group job codes that have a common function but may differ in complexity, scope, or level, and then creates job codes to identify job types and titles. For more information see "Creating a Job Family" on page 108 and "Creating a Job Code" on page 109.

3. **Verify and update employee information.** The administrator verifies and maintains employee job information for accurate compensation results. For more information, see "Updating Employee Job Information" on page 110.

4. **Define compensation guidelines.** The administrator creates guidelines for merit, variable pay and stock compensation. For more information, see "Establishing Compensation Guidelines" on page 112.

5. **Define compensation eligibility rules.** The administrator establishes eligibility rules to determine which employees are eligible for specific types of compensation. For more information, see "Defining Compensation Eligibility Rules" on page 115.

6. **Define the compensation plan rollout participants.** The administrator selects the management levels within the organization that will participate in the compensation planning process. For more information, see "Defining the Compensation Plan Rollout" on page 116.

7 **Define the compensation budgets and associated employees.** The administrator creates compensation type budgets with expressions that are used when calculating the budget, and then adds employees to the compensation budget. For more information, see "Managing Compensation Budgets" on page 118.

8 **Create the planning cycle and add compensation type components.** The administrator defines the period, budget guidelines, eligibility rules and so on that are incorporated into the planning cycle for the compensation plan. For more information, see "Defining Planning Cycles" on page 123.

9 **Generate the compensation plans.** The administrator creates the compensation plans for use by managers participating in the Rollout. For more information, see "Generating Compensation Plans" on page 126.

Creating a Salary Grade

You can create salary grades to establish salary ranges within your organization.

To create a salary grade

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > Salary Grades.
2. In the Salary Grades list, add a new record, and then complete the name and description fields.
3. Select the check box in the Active field to activate the salary grade.

Creating a Salary Plan

Salary plans define the salary range associated with each salary grade. To create the association between an employee and a salary range, each employee must have a salary plan and salary grade specified within Employee Administration.

To create a salary plan

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

To add a salary grade to the salary plan

1. In the Salary Plans list, select the salary plan.
2. In the Salary Grades list, add a new record, and then click the select button in the Salary Grade field.
3. In the Pick Salary Grade dialog box, query to locate a salary grade to include with the salary plan, and then click OK.
4. Complete the remaining fields for the salary grade.

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

Fields	Comments
Active	Select the check box to activate the salary.
Currency	Select the appropriate currency code for the salary plan.
Effective Date	Enter the date on which the salary grade is active. The Active check box must be selected for the salary grade to be activated on the specified date.
Max Salary Range	Enter the maximum salary for the salary grade.
Min Salary Range	Enter the minimum salary for the salary grades.

Fields	Comments
Salary Range 25th Percentile	Enter the 25th percentile salary for the salary grade.
Salary Range 75th Percentile	Enter the 75th percentile salary for the salary grade.
Salary Range Midpoint	Enter the midpoint salary for the salary grade. This value is used to calculate a compa ratio for the employee.

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

NOTE: To modify an existing salary range within a salary plan, create a new effective dated row within the Salary Plan's Salary Grade list.

Creating a Job Family

Job families can be created to categorize job codes and group employees when defining eligibility rules for compensation.

To create a job family

1. From the application-level menu, choose View > Site Map > Application Administration > Job Families.
2. In the Job Families list, add a new record, and then complete the fields.

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

Field	Comments
Active	A check mark indicates that the job family is active.
Description	Enter a description for the job family.
Effective date	The date on which the selected job family becomes available.
Job Family	Enter a name for the job family.

Creating a Job Code

You can create job codes to link employees with specific job attributes defined by your organization. Job code attributes can include a salary grade, job family, Fair Labor Standards Act (FLSA) status, and Equal Employment Opportunity (EEO) category. Job codes are a common attribute in most HRMS applications.

To create a job code

1. From the application-level menu, choose View > Site Map > Application Administration > Job Codes.
2. In the Job Codes list, add a new record, and then complete the fields.

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

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

Updating Employee Job Information

As part of the administrative process, employee job information should be maintained within the Siebel application. Employee job information such as Employment Status, Employee Type, Job Code, Salary, and so on, must be kept current to produce accurate results for the compensation planning process.

To update an employee's job information

1. From the application-level menu, choose View > Site Map > Employee Administration > Employees.
2. Click the Job Information view tab.
3. In the Employees list, query to find the employee whose job information you want to update.

4 Complete the applicable fields for the employee records.

The following table describes the fields in the employee record.

Field	Comments
Bonus Target %	Percentage of the employee's salary that is the targeted bonus amount.
Compensation Final Approver	Indicates that the employee has final approver authority. When users with final approver authority approve a compensation plan, the plan receives a Final Approval status and does not require any further approvals.
Currency	Currency code associated with the salary
Employee Type	Employee type of the employee. Only those with Employee Type of Employee are included during compensation plan creation.
Employment Status	Employment status of the employee. Terminated employees are not included during compensation plan creation.
Job Code	Employee's job code.
Salary	Employee's salary.
Salary Plan	Employee's salary plan.

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

Establishing Compensation Guidelines

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

This section includes procedures for the following topics:

- Creating a Compensation Guideline
- Defining Compensation Guideline Ranges
- Associating a Salary Plan and Grade with the Guideline Table

Creating a Compensation Guideline

Use the following procedure to establish guidelines for compensation.

To create a guideline

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > Guidelines.
2. In the Guidelines list, add a new record, and then complete the fields.

   The following table describes the fields in the guideline record.

Field	Comments
Name	Enter a descriptive name for the guideline.
Description	Enter a description for the guideline.
Type	Select the guideline type from the list. Options are Merit, Variable Pay, Promotion, and Stock.
Effective Date	Specify the effective date of the guideline.
Active	Select the check box to activate the guideline.

Defining Compensation Guideline Ranges

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

To set guideline ranges

1. In the Guidelines list, select the guideline.
2. In the Guideline Table list, select the guideline for which ranges will be defined.
3. In the Guideline Ranges list, add a new record and complete the fields.

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

Field	Comments
Factor 1 - Low Value	Enter the low value of the range for Factor 1.
Factor 1 - High Value	Enter the high value of the range for Factor 1.
Factor 2 - Low Value	Enter the low value of the range for Factor 2.
Factor 2 - High Value	Enter the high value of the range for Factor 2.
Minimum	Enter the guideline minimum amount.
Maximum	Enter the guideline maximum amount.
Target	Enter the guideline target amount.
Default	Select the default row to be used when an employee's Factor 1 and Factor 2 combination do not match a row in the table.

Associating a Salary Plan and Grade with the Guideline Table

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

To associate salary information with guidelines

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

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

Field	Comments
Salary Plan	Select the salary plan for which the guideline applies. The salary plan is used in combination with the selected salary grade.
Salary Grade	Select the salary grade for which the guideline applies. The salary grade is used in combination with the selected salary plan.
Factor 1	Select the factor for determining the guideline. The options are: Periodic Review. The most recent periodic review rating from Siebel Objectives and Reviews Annual Review. The most recent annual review rating from Siebel Objectives and Reviews Compa-Ratio. The salary and salary range midpoint Salary Quartile. The salary quartile based on the salary range
Factor 2	(Optional) Select a second factor for determining the guideline.

Defining Compensation Eligibility Rules

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

To create an eligibility rule

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > Eligibility Rules.
2. In the Employee list, click Query.
3. In the Query form, enter the criteria to find the employees that are included in the eligibility rule, and then click Go.

   The list of employees is the result of the eligibility rule.
4. Click the menu button and then choosing Save Query As (ALT + S) to save the eligibility rule.

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

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

After an eligibility rule has been saved, you select it from the Planning Cycles and Budgets views. For more information, see "Managing Compensation Budgets" on page 118 and "Defining Planning Cycles" on page 123.

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

Defining the Compensation Plan Rollout

Siebel Compensation Planning allows organizations to select the management levels within the organizational hierarchy that participate in the compensation planning process. The term *plan rollout* refers to the determination and control over which managers participate in the planning process. A compensation plan is automatically created for each manager who participates in the planning process. For more information, see "Defining Planning Cycles" on page 123.

Participation in the compensation planning process is defined within Position Administration. The designation is accomplished by first identifying positions as business unit leaders, and then specifying the number of levels below the business unit leaders that participate in the planning process.

Figure 13 shows an identified business unit with levels. In this example, if John's position (Level 1) is selected as a business unit leader with one level below, then Mark, Jane, and Chris (Level 2) would also have compensation plans created for them. Employees in Level 3 and Level 4 are automatically rolled up into Level 2 compensation plans during the plan creation process.

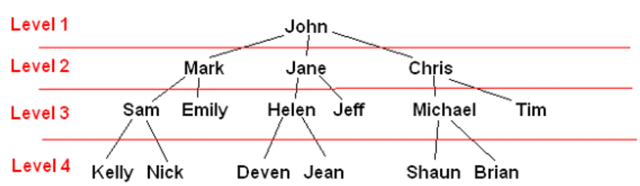

Figure 13. Business Unit with Levels

To define compensation plan rollout

1. From the application-level menu, choose View > Site Map > Group Administration > Positions.

2. In the Positions list, query to find the position of the employee you want to designate as a business unit leader.

3 In the form, specify the number of levels that will participate in the planning process in the Compensation Plan Rollout field.

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

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

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

Managing Compensation Budgets

Compensation planning involves creating and maintaining budgets for each type of compensation. Before the planning process can begin, you must define a budget for each type of compensation included in the compensation plan. For each compensation type, you can create a logical expression to calculate the budgeted amount for each employee. During the budget calculation process, a record is created for each employee within the Employees list using the evaluated expression. This section includes information and procedures for the following topics:

- Creating a Compensation Budget
- Defining Compensation Budget Expressions
- Calculating the Compensation Budget
- Locking the Compensation Budget
- Adding an Employee to the Compensation Budget

Creating a Compensation Budget

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

- The employee has an employee type of Employee.
- The employee has an employment status of Active, Leave of Absence, or Paid Leave of Absence.
- The employee meets each eligibility rule applied to the budgeting process.

To create a budget

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > Budgets.

2 In the Budgets list, add a new record and complete the fields.

The following table describes the fields in the budget record.

Field	Comments
Active	Select the check box to activate the budget.
Currency	Select the appropriate currency code for the budget.
Last Run	Indicates the date and time of the last budget calculation.
Name	Enter a name for the budget.
Organization	Click the select button to choose the organization associated with the budget.
Period	Select the period that the budget covers. The Start and End fields are populated after you select a period.
Status	A system-generated value. Values are New, Calculated and Locked. For more information, see "Locking the Compensation Budget" on page 121.

To create budget types for the budget

1 In the Budgets list, select the budget.

2 In the Budget Types list, add a new record and complete the fields.

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

Field	Comments
Budget	The total budget amount. This field is automatically completed when the budget is calculated. The application aggregates budget amounts for the employees associated with the selected budget type in the selected period.
Budget Spent	The total budget spent amount. The application aggregates budget spent amounts for the employees associated with the selected budget type in the selected period.
Eligibility Rule	Select an eligibility rule to indicate which employees have budgets created for them.

Field	Comments
Expression	Enter an expression to calculate the budget amount.
Type	Select the compensation type for which you want to calculate a budget. Values include Merit, Promotion, Variable Pay, and Stock.

Defining Compensation Budget Expressions

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

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

NOTE: If the employee salary has been stored in the Job Information view using a currency different from the budget currency, the employee salary is converted to the budget currency during the calculation of the budget amount. The Employee Salary field must be the first field to appear within the expression for the currency conversion to be successful.

Calculating the Compensation Budget

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

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

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

To calculate the budget

1. In the budgets list, select the budget and then click Calculate.
2. Verify that the budget calculation is completed by reviewing the status field in the budget record.

   When completed, the budget status is Calculated.

Locking the Compensation Budget

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

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

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

To lock a budget

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > Budgets.
2. In the Budgets list, query to find the budget you want to lock.
3. In the Budget record, choose Locked from the Status field drop-down list.

   NOTE: Budgets can be unlocked by changing the status back to Calculated.

Adding an Employee to the Compensation Budget

Employees can be added to the compensation budget.

To add an employee to a budget

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

Defining Planning Cycles

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

To create a planning cycle

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

   The following table describes the fields in the planning cycle record.

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

Field	Comments
Plan End	This read-only field shows the end date of the compensation plan period, based on the period selection.
Status	This field displays the planning cycle status. The following values indicate status: ■ New. The plan creation process has not been invoked. ■ In Progress. The plan creation process is in progress. ■ Done. The plans have been created, but have not been released to managers for planning. ■ Locked. The plans have been created and released to managers for planning.

A planning cycle must have at least one compensation type associated with it. For each planning cycle, the list of associated components determines which component tabs (Merits, Promotions, Variable Pay, Stock, and so on) are accessible to managers during the planning process.

To associate a compensation type with a planning cycle

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

   The following table describes the fields in the component record.

Field	Comments
Name	Enter a name for the compensation component.
Type	Select the compensation type (for example, Merit, Promotion, Variable Pay, Stock).
Guidelines	Select the guideline that applies to the compensation component.

Field	Comments
Eligibility Rule	Select the eligibility rule that applies to the compensation component.
Transaction Effective Date	Select the transaction effective dates of a merit, promotion, bonus, or stock grant transaction. Specifying one or more of these dates per compensation type provides control of dates from which managers can select when determining the effective dates of salary increases, promotions, bonus payouts, and stock grants.

Generating Compensation Plans

After the planning cycle definition is completed, the actual compensation plans can be generated. The compensation plan generation process creates a plan for each manager participating in the planning process, in accordance with the compensation plan rollout settings. For more information, see "Defining the Compensation Plan Rollout" on page 116.

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

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

To generate compensation plans

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > Planning Cycles.
2. In the Planning Cycles list, select the planning cycle, and then click Create Plans.
   - During compensation plan creation, a status of In Progress appears in the Status field. When the compensation plan creation process is completed, Done appears in the status field.
   - After the plans are created, they are accessible in the All Compensation Plans view. The plans must be released so that managers can begin the planning process.

To release compensation plans

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > All Compensation Plans.
2. In the All Compensation Plans list, locate the compensation plan.

3 In the compensation plan record, change the status to Locked in the Status field.

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

Accessing All Compensation Plans

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

To access the All Compensation Plans view

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > All Compensation Plans.
2. In the All Compensation Plans list, select the compensation plan and then drill down on the hyperlink in the Name field to view details.

Viewing Employee Compensation History

The compensation plan history for each employee can be accessed in the All Employees Compensation History view. This view is useful when assessing compensation planning results for a specific employee.

To view the compensation planning history for an employee

1. From the application-level menu, choose View > Site Map > Compensation Planning Administration > All Employees Compensation History.
2. In the Employees list, query to find the employee whose history you want to view.
3. In the History list, query to locate specific information.

Currency Exchange Rates for Compensation Planning

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

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

For more information on setting up currencies, see *Applications Administration Guide*.

Setting Up Literature, Links, and Bulletins 7

Siebel ERM allows administrators to publish literature and links within the appropriate views in their Siebel application. This section describes the procedures used to publish and administer literature and links within Siebel ERM.

Publishing Literature, Links and Bulletins

Using the Message Broadcasts and the Literature features, you can publish product literature, distribute Web clips, provide links to Web sites, and post bulletins on the ERM home page. Users receive this information based on subscription information in their tracking profile.

For more information about tracking profiles, see "Using Tracking Profile to Control ERM Home Page Information" on page 40.

Publishing Literature

You can distribute literature items such as sales brochures, marketing presentations, and price sheets to a targeted audience of users. When you create a literature record in the Siebel Encyclopedia, you identify the accounts, competitors, industries, and products associated with the contents of the file. Users who have selected those topics in their tracking profile receive a link to the literature file. When a user clicks the link, the program that was used to create the file opens and the file appears.

You can use the release and expiration date in the Literature view to control when literature items are posted.

As shown in Figure 14, literature associated with accounts and competitors automatically appears in the literature section of Account and Competitor Briefing pages, also known as Customer Content. If the literature items are deleted from the Siebel Encyclopedia, then the items are removed from Account or Competitor Briefings.

NOTE: Users must have the appropriate applications installed to view literature items. For example, to view .pdf files, the user must have Adobe Acrobat Reader.

For detailed information about literature, see *Applications Administration Guide*.

Figure 14. Literature Section on the ERM Home Page

Example Process for Publishing Links and Bulletins

The following section describes the process an administrator might follow to distribute literature, recommended links and bulletins to users. Your company may follow a different process flow according to its business requirements.

Administrator Procedures

The Siebel administrator requires administrative responsibilities to:

1. **Create literature records.** The administrator creates literature records and specifies the literature type to create a recommended link or Web clip. The administrator then associates the literature records with accounts, competitors and products. For more information, see "Publishing Web Clips and Recommended Links" on page 135.

2. **Create company bulletins.** The administrator uses Message Broadcasts to create bulletins for company announcements and alerts. For more information, see "Publishing Bulletins on ERM Home Page" on page 139.

Publishing Web Clips and Recommended Links

Recommended Links allow you to distribute useful Web pages to users. You can include the linked page in the Web Clips section in-line or as a hyperlink.

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

Figure 15 shows a recommended link with the display type of new window. The link appears in users' ERM home pages. When users click the link, the Web page opens in a new window.

Figure 15. Recommended Link

To publish Web Clips and Recommended Links

1. From the application-level menu, choose View > Site Map > Portal Administration > Literature.

2 In the Literature list, add a new record, enter a name and description, and complete the fields.

The following table describes some of the fields.

Field	Comments
Author	Click the select button to select the author's name.
Distribution Method	Indicates whether or not the file is automatically distributed to users. **Publish**. Sends the record to the user and begins the transmission of the file. If your user does nothing during a synchronization session, the file downloads automatically. If your user explicitly skips the file, the file is not downloaded during the synchronization session. During the next synchronization session, downloading again does not occur. **By Request**. The user gets the record, but not the actual file. The user must request the file by selecting the Request field.
Expiration Date	To post the literature item on the user's ERM Home page, enter an expiration date.
File Name	Enter the name of the file or a URL. URLs must include the protocol, for example, `http://`.
File Type	The file type is automatically entered.
Internal	Indicates whether or not the document is about your company and not intended for public distribution (internal). ■ Select the check box if the document is internal. ■ Clear the check box if the document is about another company (external) or is intended for public distribution. ■ If the literature is internal, it does not appear as a choice in the Enclosure list in the My Correspondence Requests view or in the Literature list in the Product Detail Administration view. To change this behavior, remove the Search Specification, Internal = Y on the appropriate Business Component. For more information on changing Business Components, see *Siebel Tools Reference*.

Field	Comments
Literature Type	Specify the type of link you are creating. For example, if you are creating a recommended link or Web clip, select Recommended Link. If you are creating a link to a file, select the appropriate type for the file. For example, for a sales presentation, you might select Sales Tool: Presentation.
Local	This check box is visible only when you are logged in to a local database. Indicates whether the document is available on the local hard disk. If a document is not available locally, you can request it by selecting the Request field. The file is downloaded during your next synchronization session.
Modified	The date and time of the last file modification is automatically entered.
Organization	Select the organization to which you want to distribute the literature item.
Release Date	To post the literature item in the ERM Home page, enter a release date.
Size	The file size is automatically entered.
Synopsis	Enter a summary of the literature item. Text in the Synopsis field appears on the user's ERM Home page. If nothing is entered in the Synopsis field, the contents of the Description field appear instead.

Field	Comments
Update File	A check mark in this check box indicates that the copy of the literature should be updated automatically each time the original file is updated.
Web Display	If you are linking to a Web page, use this field to determine how to display it. **Frame**. Displays a link to the Web page. When the user clicks the link, the page appears in the current frame. **Window**. Displays a link to the Web page. When the user clicks the link, the page appears in an expanded window. The user must use the Web browser's Back button to return to Siebel ERM. **New Window**. Displays a link to the Web page. When the user clicks the link, the page is displayed in a new browser window, allowing the user to switch between Siebel ERM and the Web page. **In-Line**. Displays the entire Web page in the selected section of the portal page. Displaying Web pages in-line works best with simple Web pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages before distributing them to users.

3. Select or add accounts, competitors, industries, and products associated with the literature item.

   If the literature item is associated with an account or competitor, it appears in the Literature section of the Account or Competitor Briefing page.

   For users who have included the associated topics in their tracking profile, a link to the literature item appears in the Literature section on the ERM Home page.

Publishing Bulletins on ERM Home Page

Bulletins are internal company messages that alert users to company announcements. Bulletins appear in the New Bulletins section of the ERM home page. Figure 16 shows an example of the New Bulletins view tab on the home page, with bulletin text and headline.

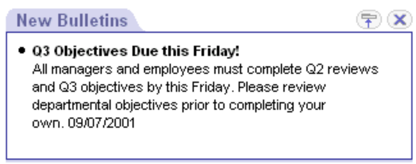

Figure 16. New Bulletins

To publish bulletins

1. From the application-level menu, choose View > Site Map > Communications Administration > Message Broadcasts.
2. In the Message Broadcasts list, add a new record and complete the fields.

   The following table describes the fields in a message broadcast record.

Field	Comments
Abstract	Enter the bulletin's title. Text in the Abstract field appears in bold and can be up to 100 characters.
Activation Date	Select the activation date and time for the bulletin to appear.
All Users	Select the All Users check box to send the bulletin to users.
Briefing Bulletin	Select the Briefing Bulletin check box if you want the bulletin to appear in the New Bulletins section of the ERM home page.
Broadcast	Select this check box to make the bulletin available for broadcast.

Field	Comments
Division	To send the bulletin to users in a specific Division, click Select button, and then in the dialog box that appears, select or create the Divisions you want to receive the bulletin.
Division	Select the division to which the bulletin should be sent.
Expiration Date	Select the expiration date and time for the bulletin. If there is no expiration date specified, the bulletin appears indefinitely. To remove a bulletin that does not have an expiration, delete the bulletin's Activate Date.
Message	Enter the text of broadcast message. This text appears as the body of the bulletin and can be any number of characters in length.
Recipient	To send the bulletin to specific users, click the Select button. In the dialog box, select or add the users you want to receive the bulletin.
Recipient	Select the recipients to whom the bulletin should be sent.
Severity	Select the Severity of the message. Options are Normal, High, Urgent, or Urgent with Alert. Normal is the least severe, and Urgent with Alert is the most severe.

For more information about Message Broadcasting, see the chapter about message broadcasting in *Applications Administration Guide*.

Managing Group News 8

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

This section describes the how to set up and manage Group News authoring, and perform the following procedures:

- Create, import, and edit dynamic content using Siebel Content Editor
- Create a news story and publish it in multiple formats throughout the application
- Preview news articles in multiple formats
- Submit content for approval, based on workflow technology
- Review and roll back to previous article versions
- Control end-user access to content, based on roles and responsibilities
- Automate the publishing, expiration, and archiving of content

Business Scenario for Group News

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

Administrator

The CEO of an organization determines that important news stories should originate in the Top Story section on the Home Page and move to the Feature Articles section on day two and the Archive section on day three. This business requirement is communicated to the Group News administrator responsible for creating content paths. As part of the content path creation process, the news administrator designates authors and approvers through responsibilities, determines the approver workflow, the set of approvers, and the employee access groups that have visibility rights to the news story. After the content paths are created, the news administrator defines three stages, one for each of the sections in which a news story associated with this content path will be published—Top Story, Feature Articles, and News Archive.

Example Process for Group News

The following section describes the processes an administrator and an end user might follow to set up and use Group News. Your company may follow a different process according to its business requirements.

Administrator Procedures

The Siebel administrator requires administrative responsibilities to:

- **Set up group news users and responsibilities.** The administrator assigns responsibilities to administrators, managers and authors, allowing these users to work with news content. For more information, see "Setting Up News Administrators, Authors, and Approvers" on page 145.
- **Set up workflow.** The administrator defines routing and approver workflow processes for Group News content. For more information, see "Setting Up Group News Approver Workflow" on page 147.
- **Create content paths.** The administrator creates the content paths which authors associate with news stories. For more information, see "Creating a Content Path" on page 148.
- **Create stages.** The administrator creates stages so that news can be published in multiple locations. For more information, see "Creating Stages for the Group News Content Path" on page 150.
- **Select levels of approvers**. The administrator sets up the approval process that routes content from the author to the approvers. For more information, see "Designating Group News Approvers" on page 152.
- **Set up Group News access**. The administrator sets up which employee groups have access rights. For more information, see "Setting Up Access to Group News" on page 154.

End-User Procedures

The end user, a content manager and approver, requires the appropriate responsibilities to:

1. **Create and submit a news story.** The content manager creates a news story, selects a content path, and submits it for approval. For more information, see "Creating a News Story (End User)" on page 155.
2. **Preview the new story.** For more information, see "Previewing a News Story (End User)" on page 160.
3. **Submit the news for approval.** For more information, see "Submitting a News Story for Approval (End User)" on page 161.
4. **Approver approves news story for publication.** The approver modifies the news story, and approves it for publication. For more information, see "Approving a News Story (End User)" on page 162.

Setting Up News Administrators, Authors, and Approvers

Before a user can author and approve news stories, the administrator must associate the user with the appropriate responsibilities.

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

Table 12. Preconfigured Group News Responsibilities

Responsibility	Comments
ERM Group News Administrator	Users with the Group News Administrator responsibility can access the Group News Administration views and can perform the following tasks: ■ Create a content path, which includes selecting an approver workflow, defining content stages, assigning approvers, and designating access groups. ■ Edit submitted or completed news stories.
Content Manager	Users with the Content Manager responsibility can access the Group News Authoring views and can author and approve news stories. An ERM Content Manager can approve a specific news story only if the manager is designated as an approver for the content path associated with the news story.
ERM Manager	Users with the ERM Manager or ERM User responsibility can access the News Archive on myPage and departmental portal pages. For more information on portal page access, see *Applications Administration Guide*.
ERM User	Users with the ERM Manager or ERM User responsibility can access the News Archive on myPage and departmental portal pages. For more information on portal page access, see *Applications Administration Guide*.

To set up an administrator, author, or approver for Group News

1. From the application-level menu, choose View > Site Map > Application Administration > Responsibilities.

2. In the Responsibilities list, query to find the responsibility with which you want to associate an employee:

   - ERM User
   - ERM Manager
   - Content Manager
   - ERM Group News Administrator

   NOTE: The Views tab at the bottom of the screen includes the views that a user assigned to the selected responsibility 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 the *Security Guide for Siebel eBusiness Applications*.

   ---

3. In the Users list, click New.

4. In the Add Users dialog box, query to find the user you want to add, and then click OK.

   The user you add is associated with the Group News responsibility you selected.

Setting Up Group News Approver Workflow

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

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

To set up a Group News workflow

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Workflow Processes list, query to find *Group News*.
3. Select the Group News approver workflow process you want to use.
4. In the Status field, verify that the workflow is Active.

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

Creating a Content Path

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

- The business process (approver workflow) that automates the approval process
- When the news story is published within the application

  News stories can be scheduled for publication in multiple locations, or stages, throughout the application.
- The format in which the news story is published
- When the news story is published in each of the stages
- The approvers scheduled to approve the news story
- The group of ERM users or access groups that have visibility rights to the news story

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

To create a content path

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

   The content path name and description should help news authors determine the appropriate content path for news stories.

   TIP: As part of the description, include information on which access groups are receiving the content.

   ---

3. In the WorkFlow field, click the select button.

4 In the Workflow Process Definition dialog box, query to find the appropriate Group News workflow approver process, and then click OK.

- To make the content available to employees, click to remove the check mark from the Private field.
- To make the content available only to specific groups of employees, click to check the Private Field.
- You can specify the specific employee groups from the Access Groups view tab.

Creating Stages for the Group News Content Path

News stories can be scheduled for publication in multiple locations, or stages throughout the application.

To create the stages for the content path

1. Create a Content Path record, using the procedure "Creating a Content Path" on page 148.
2. In the Content Path list, select the record and click the Stages view tab.

3 In the Stages list, add a new record and complete the fields.

The following table describes the fields in the stage record.

Field	Comment
Description	A brief description of the stage.
End Day	Determines, in conjunction with the go-live date specified by the author, the expiration date for any given stage. To remove a news story from the selected stage five days after the go-live date, for example, enter 5.
Page	Specifies the Siebel page for the content.
Section	Specifies the section on a page for the content. The Section field shows the available sections in the Siebel application. You should make sure that the section you select is an active section on the selected view.
Start Day	Determines, in conjunction with the go-live date specified by the author, the publication date for any given stage. For example, to publish a news story in the selected stage on the go-live date enter 0.
View	Indicates the page view on which the content appears.

Designating Group News Approvers

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

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

To select the group news approvers

1. Create a Content Path record, using the procedure "To create a content path" on page 148.
2. Create the stages for the content path, using the procedure "To create the stages for the content path" on page 150.
3. In the Content Path list, select the record and click the Approvers view tab.
4. In the Approvers list, add a new record, and then complete the fields.
   a. In the Position field, click the select button.
   b. In the Pick Position list, query for the employee you want to designate as an approver, select the employee, and then click OK.
   c. In the Sequence field, enter a sequence number for the approver.

      The sequence number indicates the order in which approvers approve the news story. The first approver has a sequence number of 1.

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

Modifying a Content Path to Change an Approver

You can modify a content path to change the associated approver.

To change an approver associated with a content path

1. From the application-level menu, choose View > Site Map > Group News Administration > Content Path.
2. In the Content Path list, query to find the content path you want to modify.
3. Click the Approvers view tab.
4. In the Approvers list, select the record of the approver you want to change.
5. In the Position field, click the select button.
6. In the Pick Position list, query for the employee you want to designate as an approver, and then click OK.
7. In the Sequence field, enter a sequence number for the approver.

   The sequence number indicates the order in which approvers approve the news story. The first approver has a sequence number of 1.

Setting Up Access to Group News

You can establish which employee access groups have visibility rights to the news story.

To set up access to news

1. From the application-level menu, choose View > Site Map > Group News Administration > Content Path.
2. In the Content Path list, query to find the content path you want to modify.
3. In the Content Path list, select the record and verify that the Private Flag check box includes a check mark.
4. Click the Access Groups view tab, and then in the Access Groups list, add a new record.
    a. In the Add Access Groups list, query to find the access group you want to add.
    b. Click OK to add the access group to the Access Groups list.

    Repeat this step for each access group you want to add.
5. In Content Path list, select the Content Path record and in the Status field select Active from the drop-down list.

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

Creating a News Story (End User)

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

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

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

To create a news story

1. From the application-level menu, choose View > Site Map > Group News Authoring > News Inbox.
2. Click the Information view tab, and then in the Information form click New.
3. Complete the fields to provide information about the news story.

   The following table describes the fields in the Information form.

Field	Comments
Author	Provide the name of the author. This field defaults to the current user and is not made visible to readers.
By-Line	Specify the by-line text for the story as it should appear to readers.
Content Path	Specify the content path to associate with the news story.

Field	Comments
Content Type	Specify the priority of the news story. The content type can be used internally to help categorize news stories by priority level. The content type does not affect the appearance of the news story to readers.
Department	Specify the department of the author or news story.
Go-Live Date	Specify the date on which the content is activated. This field defaults to the current date and time. The value in this field is also used in combination with the content path Start Day and End Day values to further define the time content becomes active.
Headline	Specify a headline for the news story as it should appear to readers.
Name	Specify a name for the news story. The name is not made visible to readers.
Region	Specify the region of the author or news story.

Creating Content for a News Story

After the news story is created, authors can enter and edit content for the story, or import content that was previously created in an external HTML editor. For information on importing content, see “To import a news story” on page 158.

To create the news story content

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

   For more information, see "To create a news story" on page 155.
3. In the Content Editor field, enter the news story content.

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

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

   The following table describes some of the fields.

Field	Comments
Large Image	Select a large image for news stories that will be published in the Top Story section.
Long Abstract	Create a long abstract for news stories that will be published in the Top Story section.
Short Abstract	Enter a short abstract for news stories that will be published in the Feature Articles or My News sections.
Small Image	Select a small image for news stories that will be published in the Feature Articles or My News sections.

Importing a News Story

Use the following procedure to import content for news stories.

To import a news story

1. From the application-level menu, choose View > Site Map > Group News Authoring > News Inbox.
2. In the News Inbox form, click New, and then complete the fields to add the news details.

   The following table describes the fields in the News Inbox record.

Field	Comments
Author	Provide the name of the author. This field defaults to the current user and is not made visible to readers.
By-Line	Specify the by-line text for the story as it should appear to readers.
Content Path	Specify the content path to associate with the news story.
Content Type	Specify the priority of the news story. The content type can be used internally to help categorize news stories by priority level. The content type does not affect the appearance of news story to readers.
Department	Specify the department of the author or news story.
Go-Live Date	Specify the date on which the content becomes live. This field defaults to the current date and time. The value in this field is also used in combination with the content path Start Day and End Day values to further define the time content becomes active.
Headline	Specify a headline for the news story as it should appear to readers.
Name	Specify a name for the news story. The name is not made visible to readers.
Region	Specify the region of the author or news story.

3. Click the Content Editing view tab, and then in the Content Editing form, click Import Article.
4. In the Pick Content dialog box, click New.

5 In the Insert Content dialog box, complete the fields.

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

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

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

The imported news story appears in the Content Editing field. Authors and approvers can edit imported content using the Content Editor.

Previewing a News Story (End User)

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

To preview the news story

1. From the application-level menu, choose View > Site Map > Group News Authoring > News Inbox.
2. In the News Stories list, select the news story you want to preview.
3. Click the Preview view tab to view the news story.

Submitting a News Story for Approval (End User)

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

To submit a news story for approval

1. From the application-level menu, choose View > Site Map > Group News Authoring > News Inbox.
2. In the News Stories list, query to find the news story you want to submit.
3. Make sure the story you want is selected.
4. In the Status drop-down list, select Submitted.

Approving a News Story (End User)

News approvers must have the Content Manager responsibility. For more information on setting up approvers with the appropriate responsibilities, see "Setting Up News Administrators, Authors, and Approvers" on page 145. Approvers access news stories that require their approval by navigating to their news inboxes in the Group News Authoring screen.

To approve a news story

1. From the application-level menu, choose View > Site Map > Group News Authoring > News Inbox.

2. In the News Stories list, select the news story you want to approve.

3. Click the Content Editing view tab, and in the Status field, choose Completed from the drop-down list.

Setting Up eContent Services 9

Siebel eContent Services is a news and company information subscription service that is preintegrated with Siebel ERM.

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

This chapter describes the administration procedures necessary to include industry news content in a Siebel application.

Business Scenario for eContent Services

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

Administrator

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

The administrator first designates the news topic administrator, creates access groups that can access the news content, and establishes host and authentication credentials.

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

Example Process for eContent Services

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

Administrator Procedures

The Siebel administrator requires administrative responsibilities to:

1. **Assign News Topic Administrator responsibilities.** The administrator assigns responsibilities to the employee who will administer news topics. For more information, see "Assigning News Topic Administrator Responsibilities" on page 166.
2. **Create access groups**. The administrator creates access groups so that relevant content can be directed to specific groups of users. For more information, see "Creating Access Groups for eContent News Services" on page 167.
3. **Set up host and authentication credentials.** The administrator establishes the content host name, user name, and password that allow access to the Siebel application-hosted data. For more information, see "Setting Up eContent Host and Authentication Credentials" on page 168.
4. **Create news packages**. The administrator sets up news packages—subscriptions to third-party content sources offered by Siebel eContent Services. For more information, see "Creating a News Package" on page 169.
5. **Create news topics.** The administrator sets up news topics to locate topics of interest within the news packages. For more information, see "Managing News Topics" on page 170.
6. **Associate accounts and competitors with news topics.** The administrator associates accounts and competitors to new topics to create briefings. For more information, see "Retrieving Account and Competitor News for Briefings" on page 173 and "Associating Accounts and Competitors with News Topics" on page 176.
7. **Associate your company with a news topic**. The administrator associates his organization with a news topic to display company news on the company's Briefings page. For more information, see "Associating Your Company with a News Topic" on page 177.

Assigning News Topic Administrator Responsibilities

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

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

Creating Access Groups for eContent News Services

Before you configure or create a news topic, consider which groups within your organization should have access to news services provided by eContent Services. For example, if your organization has purchased seats of eContent Services for a subset of employees, only those employees should have access to the external content. In addition, depending on the employee's role in an organization, or the types of clients with which the employee works, an employee may need access to certain industry sources and content topics. Rather than configure topics within eContent Services so that the topics are visible to any user, you can configure content so that it is visible to specific groups of users. You must associate an access group with a news package when you set up the package. As a result, you should create the appropriate access groups for your topics before you set up eContent Services.

Listed below are general procedures you should complete before setting up eContent Services.

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

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

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

Setting Up eContent Host and Authentication Credentials

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

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

To set up eContent host and authentication credentials

1. From the application-level menu, choose Site Map > Integration Administration > Host Administration.
2. In the HTTP Host list, add a new record and complete the fields.

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

   The following table describes the fields in the HTTP host record.

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

3. Restart your server.

Creating a News Package

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

To create a news package

1. From the application-level menu, choose Site Map > Portal Administration > News Topic Manager.
2. In the News Packages list, click New to create a news package record.

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

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

After you set up a news package, you can create the news topics. For more information on creating a news topic, see "Managing News Topics" on page 170.

Managing News Topics

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

Table 13. Siebel eContent Services News Topic Types

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

Creating a News Topic

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

To create a news topic

1. From the application-level menu, choose Site Map > Portal Administration > News Topic Manager.
2. In the News Packages list, query to find the news package for which you want to create a news topic.

3 Click one of the following view tabs:

- Administrator-Defined
- User-Defined

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

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

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

5 Click Preview to see the topic final format.

Editing a New Topic

Use the following procedure to modify an news topic.

To edit a news topic

1 From the application-level menu, choose Site Map > Portal Administration > News Topic Manager.

2. In the News Packages list, query to find the news package associated with the news topic.
3. Click one of the following view tabs:
   - Administrator-Defined
   - User-Defined
4. In the News Topics list, query to find the news topic.
5. In the news topic record, modify the fields as needed.

Inactivating a News Topic

News topics are preconfigured as active. You can use the News Topics Administration screen to inactivate or activate news topics.

To inactivate a news topic

1. From the application-level menu, choose Site Map > Portal Administration > News Topic Manager.
2. In the News Packages list, query to find the news topic.
3. Click one of the following view tabs:
   - Administrator-Defined
   - Predefined
   - User-Defined
4. In the News Topics list, query to find the news topic.
5. In the Inactive field, select the check box.

Retrieving Account and Competitor News for Briefings

Siebel eContent Services allows you to include briefings about your accounts, competitors, other organizations, and so on, in your Siebel ERM application. These briefings are retrieved from data within your Siebel application, as well as from external news sources based on your organization's subscriptions with Siebel eContent Services.

As an administrator you can create account topics, which are used to associate your Siebel accounts and competitors with external content. You also can associate your organization with a news topic to display company news on the My Briefings page. For more information, see "Associating Accounts and Competitors with News Topics" on page 176 and "Associating Your Company with a News Topic" on page 177.

Siebel ERM can use the account topics you create to search Siebel eContent Services for information about your accounts and competitors.

Siebel ERM uses D&B as its standard for company topics. You use the Account Topic Manager to associate accounts and competitors to D-U-N-S numbers. D-U-N-S numbers are a standard way for external content providers to index company information. If you search using an indexed term, such as the D-U-N-S number, rather than a more generic search term, such as company name, then your search results are more likely to be accurate and relevant.

NOTE: D-U-N-S numbers that have been assigned and populated to an account do not always appear. To find out if the D-U-N-S has been assigned, click the drop-down list for the DUNS field. If the D-U-N-S record has already been assigned, it appears in this drop-down list. Click OK and the D-U-N-S record appears in the field.

By associating your accounts and competitors with topics, you also gain access to Siebel Company Vocabulary, which provides access to other common company identifiers, such as its stock ticker symbol. This gives you the ability to configure portal agents to submit different search terms to different content providers—for example, the D-U-N-S number to one content provider, the stock ticker symbol to another.

For more information about portal agents, see *Siebel Portal Framework Guide*.

You can associate multiple accounts from your Siebel database to a single topic. This is an appropriate section when external content services consider several accounts in your Siebel database as a single entity. For example, you can have several divisions of Acme, Inc. (Acme West, Acme East, and Acme South) listed as unique accounts in your Siebel database, while an external content provider may index news based on the parent company, Acme, Inc.

You link accounts to topics using the Accounts Topic Manager screen, shown in Figure 17. The illustration shows the Accounts list at the top of a Siebel application screen. At the bottom of the screen is the Company Search list.

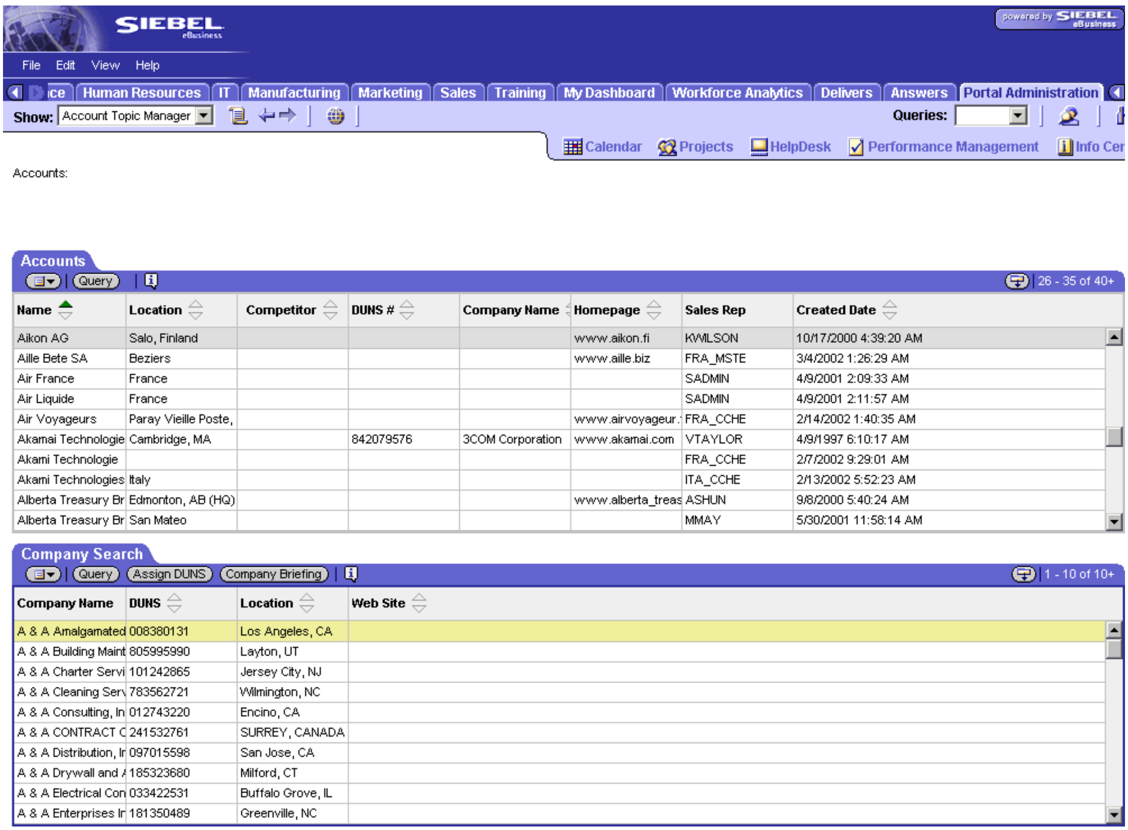

Figure 17. Account Topic Manager

Associating Accounts and Competitors with News Topics

For news and company information to appear on the My Briefing page, you must link accounts and competitors in your Siebel database to a topic. D-U-N-S numbers are the standard topics used by Siebel eContent Services to identify companies. You link accounts and competitors to topics using the Account Topic Manager.

To create or change a topic association

1. From the application-level menu, choose View > Site Map > Portal Administration > Account Topic Manager.

   The accounts and competitors from your Siebel database appear in the Accounts list. Name and Location are read-only. If the company is marked as a Competitor in your Siebel database, there is a check mark in the Competitor column.

2. In the Accounts list, query for and select the account or competitor you want to associate with a topic.

3. In the Company Search form, query for the account or competitor name in the Company Name field.

   Matching records from the Siebel eContent Services company database (or your selected external content provider database) appear. For example, you might see multiple listings of a company because each location or subsidiary might have its own D-U-N-S number assigned to allow specific searches on that location or subsidiary.

4. In the search results list, choose the specific company you want to define for your account or competitor, and click the Assign DUNS button.

   The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

   NOTE: If your company has purchased Siebel eContent Services, you can click the Company Briefing button on the Company Search form to retrieve a briefing on the selected company.

Associating Your Company with a News Topic

To be able to receive news about your own company in the Our Company section of the My Briefing page, you must associate your company with a topic. To perform this procedure using the Account Topic Manager, you associate a record called Our Company with your company's D-U-N-S number.

To associate a topic with your company

1. From the application-level menu, choose View > Site Map > Portal Administration > Account Topic Manager.
2. In the Accounts list, query for and select the account or competitor you want to associate with a topic.
3. In the Company Search list, query for the account or competitor name in the Company Name field.
4. In the search results list, choose the specific company you want to define for your account or competitor, and click the Assign DUNS button.

   The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

NOTE: If there is no company news available, the Our Company in the News section does not appear.

D& B Account Rationalization Services and News Topics

The D&B Account Rationalization Services automates the association of accounts and topics by matching your account records to D-U-N-S numbers in batch. A link to D&B's Web site appears on the Account Topic Manager view.

For more information, see *Applications Administration Guide*.

Setting Up Siebel HelpDesk 10

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 (FAQs) and interactive diagnostic tools. Employees can also use employee self-service features such as Alerts Online and Assets Online to get help. This chapter describes setting up and using Siebel HelpDesk.

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 support agent workload while increasing first-contact 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.

Siebel HelpDesk allows organizations to create new help desks to capture information for each internal service situation. Each help desk can include its own subareas and routing rules, and is configurable by administrators. This 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 allows each employee to receive a consistent level of service, and issues are recognized and escalated to facilitate a resolution.

Siebel HelpDesk helps organizations create and maintain a single repository of information so that employees can access the most current answers to questions.

Business Scenario for Siebel Help Desk

This scenario provides an example of a process performed by a Siebel HelpDesk administrator, agent, support representative, and a help desk requestor. Your company may follow a different process according to its business requirements.

Administrator

An organization using Siebel ERM hires a new employee. The administrator assigns the appropriate responsibilities to the employee so that the employee can access the help desk. The administrator assigns the employee a laptop computer and records the asset distribution using Siebel HelpDesk.

During the day, the administrator prepares for an upcoming systems upgrade by adding the affected systems to Alerts Online so that employees automatically receive notification of system outages. The administrator also creates a number of solution records, which include answers to frequently asked questions (FAQs) 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 before it is sent to users.

Example Process for Siebel HelpDesk

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

Administrator Procedures

The Siebel administrator requires administrative responsibilities to:

- **Set up help desk agents and entitlements.** The administrator associates support agents with responsibilities, and then sets up employee entitlements. For more information, see "Setting Up Siebel HelpDesk Responsibilities" on page 183 and "Setting Up Siebel HelpDesk Entitlements" on page 185.
- **Manage and Allocate Assets.** The administrator adds new assets to the Assets database, and allocates assets to employees. For more information, see "Managing and Allocating Assets" on page 186.
- **Set up Alerts Online.** The administrator adds systems and subsystems to Alerts Online, which provides system status information to employees. For more information, see "Setting Up Alerts Online" on page 188.
- **Set up Solution FAQs**. The administrator creates frequently asked questions (FAQs) for the Solutions database that employees can use to search for answers to common problems. For more information, see "Creating Siebel HelpDesk FAQs for Solutions Database" on page 190.
- **Prepare employee satisfaction survey.** The administrator modifies the list of selectable responses for the HelpDesk employee satisfaction survey that will be sent to HelpDesk users. For more information, see "Modifying Selectable Responses for Employee Surveys" on page 194.

Setting Up Siebel HelpDesk Responsibilities

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

Siebel ERM is preconfigured with several responsibilities that are specific to Siebel HelpDesk. Organizations can use these preconfigured responsibilities to set up help desk users. Table 14 describes the preconfigured help desk responsibilities.

The responsibilities can be used as is during a deployment, they can be modified to meet the needs of the particular organization, and the responsibilities can be used as a guide for creating new responsibilities.

Table 14. Preconfigured Siebel HelpDesk Responsibilities

Responsibility	Comments
HelpDesk Agent	Users with this responsibility can access the Siebel HelpDesk views.
Universal Agent	Users with this responsibility can access the Call Center views.
ERM User	Users with the ERM Manager or ERM User responsibility can access the Siebel HelpDesk.

To set up a Siebel HelpDesk agent

1. From the application-level menu, choose View > Site Map > Application Administration > Responsibilities.
2. In the Responsibilities list, query to find the responsibility with which you want to associate an employee.

   The responsibilities are:

   - ERM User
   - Universal Agent
   - HelpDesk Agent

   NOTE: The Views tab at the bottom of the screen includes the views that a user assigned to the selected responsibility 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 the *Security Guide for Siebel eBusiness Applications*.

   ---

3. In the Users subview list, add a new record.
4. In the Add Users dialog box, query to find the user you want to add, and then click OK.

   The user is associated with the selected responsibility.

Setting Up 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.

To add an employee to an entitlement

1. From the application-level menu, choose View > Site Map > Agreements > All Agreements Across Organizations.
2. In the Agreements list, select the agreement to which the entitlement belongs and drill down on the Name hyperlink.

   The Agreement form appears.
3. Click the Entitlements view tab.
4. In the Entitlements list, select an existing entitlement from the current agreement, and then complete the necessary fields.
5. Click the Contacts view tab, and in the Contacts list, add a record.
6. In the Add Contacts dialog box, select a contact, and then click OK.
7. In the Contacts list, click in the Internet field to activate the Internet flag.

NOTE: You can also create a new record or new entitlement as needed in from the All Employees - HelpDesk view.

For more information on setting up service-level agreements, see *Siebel Field Service Guide*.

Managing and Allocating Assets

As an administrator, you can assign assets, such as laptops and RSA tokens, and track assets assigned to each employee.

Adding Products to Assets Online

Using the Product Administration screens, you can add products, and then make the products available as assets.

To add a new product

1. From the application-level menu, choose View > Site Map > Product Administration > Products.
2. In the Products list click Query, enter the query criteria, and then click Go.

   The products that meet the criteria appear in the Products list.
3. Select the product and then click the More Info view tab.
4. In the Sales Product field, click the check box to make sure that the product appears in the Assets list.

   For more information about working with products, see *Siebel Field Service Guide*.

Managing New Assets

You can track and store asset information associated with employees using the Asset Management screen. For example, if your organization provides laptop computers to remote employees, you can track these assets using your Siebel application. For more information about assets, see *Siebel Field Service Guide*.

To add a new asset

1. From the application-level menu, choose View > Site Map > Asset Management > All Assets.
2. In the Assets list, add a new record.
3. In the Pick Product dialog box, query for the product, and then click OK.
4. Complete the necessary fields for the new asset.

Allocating an Asset to an Employee

Using the Employee Administration screen's All Employees – HelpDesk view, you can allocate assets to a specific employee.

To add an asset to an employee

1. From the application-level menu, choose View > Site Map > Employees > All Employees - HelpDesk.
2. In the Employees list, query to find the employee associated with the asset.
3. Click the Assets view tab.
4. In the Assets list, add a new record.
5. In the Add Assets dialog box, enter query criteria and click Go.
6. In the Add Assets dialog box, select the asset, and then click Add.

   The new asset appears in the Employee Assets list.
7. Complete the fields as needed for the employee asset.

Setting Up Alerts Online

The Alerts Online module allows employees to monitor the status of critical infrastructure systems. Status for different systems appears in the Alerts Online view from the Siebel HelpDesk page. Employees can click a system hyperlink to view status details.

As an administrator, you use the Application Administration view to add, delete, and edit systems and subsystems and their status.

Adding Systems to Alerts Online

The Alerts Online administration screen allows you to add systems to the Alerts Online section of the HelpDesk home page. You can add, delete, and edit systems and subsystems in the System Status and Subsystem Status views.

To add a system to Alerts Online

1. From the application-level menu, choose View > Site Map > Application Administration > Alerts Online.
2. In the System Status list, add a new record and complete the fields.
3. In the Name field, enter the name of the system you want to track.
4. From the Status drop-down list, select the appropriate status of the system.

   The Status field options are Currently Available, Current Outage, and Diminished Service.

Adding Subsystems to Alerts Online

The Alerts Online administration screens allow you to define the subsystems you want to track. You can add, delete, and edit systems and subsystems in the System Status and Subsystem Status views.

To add a subsystem to Alerts Online

1. From the application-level menu, choose View > Site Map > Application Administration > Alerts Online.
2. In the System Status list, query to find the system to which you want to add a subsystem.

3 In the Enterprise Subsystem list, add a new record and complete the fields.

The following table describes the fields in the substation record.

Field	Comments
Description	A description of the status.
ETA	The estimated date and time when the system is available again.
Location	The location of the subsystem.
Reported	The date and time when the status was last updated.
Reported By	The name of the user who reported the status.
Severity	The severity of the problem. For example, Critical, High, Medium, Low.
Status	The status of the system. For example, Currently Available, Current Outage, and Diminished Service.
Subsystem	The name of the subsystem you are tracking.

The status information is updated when you step off the record.

4 Refresh the page to see the changes to the status information.

Creating Siebel HelpDesk FAQs for Solutions Database

The Siebel HelpDesk application is built on a collection of problem resolution histories. This database includes a single repository for trouble tickets and resolutions logged throughout the organization. Employees can search the database and retrieve solutions to common problems without having to wait for help desk personnel to become available.

This section describes the procedures used to create and categorize frequently asked questions (FAQs). For more information on catalog and category administration, see *Siebel eSales Administration Guide*.

Creating FAQs

To publish FAQs (Siebel Solutions records), you must first create the FAQs and then categorize them in the appropriate Siebel ERM catalogs. After they are categorized, the FAQs appear in the appropriate views. To restrict user access to specific categories, you can apply access control to the categorized FAQs.

To create FAQs

1. From the application-level menu, choose View > Site Map > Solutions Administration > Solutions.
2. In the Solutions list, add a new record and complete the fields.

   The following table describes the fields in the solution record.

Fields	Comments
Description	Enter the FAQ answer that you want to appear to Siebel HelpDesk users.
FAQ	Enter the FAQ question that you want to appear to Siebel HelpDesk users.
Name	Specify the name of the FAQ. The title name does not appear to Siebel HelpDesk users, it is the name used to save the record to the Siebel file system.
Status	Select the status of the FAQ.
Type	Select Solution to indicate the record as an FAQ solution record.

After the FAQ record is created, you must associate the record with the appropriate category. For more information on categorizing an FAQ, see "Categorizing FAQs.".

Categorizing FAQs

You can use the Catalog Administration view to associate existing FAQs with a category. To display FAQs in the General FAQs list in Siebel HelpDesk, the FAQs must be categorized in the catalog called ERM Catalog. To display FAQs in the Top FAQs list in Siebel HelpDesk, the FAQs must be categorized in the catalog called ERM Top Solutions and the category called ERM Top Solutions.

For more information on creating an FAQ, see "Creating FAQs" on page 190.

To add FAQs to a Siebel ERM Category

1. From the application-level menu, choose View > Site Map > Catalog Administration > Catalog Administration.
2. In the Catalog list, query to find ERM Catalog.
3. Click the catalog name hyperlink.
4. From the Categories list, select the category to which the FAQ will be added.
5. Click the Solutions view tab, and in the Solutions list, add a new record.
6. In the Add Solutions dialog box select the FAQ you want to add to the category, and then click OK.

   The selected FAQ is associated with the selected category.

Creating a Resolution

A resolution is a content item, typically a text document or product literature item, that includes information that is relevant to solving a specific service request. To make a resolution available to Siebel HelpDesk users, you must perform the following tasks:

- Add the desired content to the literature catalog. You can specify a path, browse for a file, or link to the file through a URL.
- Provide a name for the resolution item.
- Specify the type of the resolution item that has been added.

- Optionally, associate the resolution item with a catalog category.
- 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 add a resolution item to the Siebel HelpDesk

1. From the application-level menu, choose View > Site Map > Resolutions Document Administration > Resolutions Document Administration.
2. From the Resolutions Documents list, add a new record and complete the fields.

   The following table describes some of the fields in the resolution document record.

Fields	Comments
Type	The resolution type.
Description	A brief description about the resolution item. The description can be seen by Siebel HelpDesk users.
File Name	The resolution item you want to add.
Name	The name of the resolution item. The name is visible to Siebel HelpDesk users.

Categorizing a Resolution

You can use the Catalog Administration view to associate existing resolutions with a category. For more information on creating an resolution, see "Creating a Resolution" on page 191.

To add a resolution to a category

1. From the application-level menu, choose View > Site Map > Catalog Administration.
2. In the Catalogs list, query to find ERM Catalog or the ERM Top Solutions.
3. Drill down on the hyperlink in the catalog Name field.

4. In the Categories list, select the category with which you want to associate the resolution.
5. Click the Resolution Item view tab.
6. In the Resolution Items list, add a new record and complete the fields.

Modifying Selectable Responses for Employee Surveys

The Siebel HelpDesk Employee Satisfaction survey allows you to obtain employee feedback using employee self-service. The survey is a Web-based form linked to a service request. The employee completes the form, submits it, and the help desk analyzes the results.

An administrator can modify the list of selectable responses for each survey question. For instructions on configuring control properties for the Employee Satisfaction Survey, see "Setting Up an Employee Satisfaction Survey."

To modify an employee satisfaction survey

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. Click Query, and in the Type field, type CS_* and then click Go.

   A list of customer satisfaction values appears.
3. Modify the existing values as needed.

   The following tables describes some List of Values fields.

Field	Comments
Active field	This field must be checked to be active.
Displayed Value	This is the answer that appears in the drop-down list of values.
Order field	This determines the order in which the answer appears in the drop-down list. Enter 1 to create the first value on the list, and so on.

Setting Up an Employee Satisfaction Survey

The Siebel HelpDesk Customer Satisfaction survey allows you to use an online survey to obtain employee feedback. The survey is used to solicit feedback on a specific service request the employee has submitted. This type of survey is accessible through the Service Request's detailed view. The survey results can then be analyzed and reports can also be generated within Siebel HelpDesk Agent.

To modify the Siebel HelpDesk Customer Satisfaction Survey questions and labels, you need to use Siebel Tools to configure control properties of the Customer Survey. For more information on configuring control properties, see *Siebel Tools Reference*.

Siebel HelpDesk Administrator Resources

The following resources are available for the administrator responsible for setting up and configuring Siebel HelpDesk.

Administrator 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. Siebel 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 filling out a service request, Siebel 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 (eService) 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 *Siebel Tools Reference*.

Email Notification for Alerts and 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 notification to alert employees when the status 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*.

Troubleshooting Processes and Siebel SmartScript

Siebel SmartScript allows users to perform self-directed question-and-answer sessions that simulate the experience of talking directly with an expert. The sessions can have a predefined process flow, or the flow can be designed to change dynamically according to the customer's response. The process flow can also populate the Siebel database with customer input, creating service requests and completing applications.

As an administrator, you can use Siebel SmartScripts and Siebel eService to create and administer these types of business processes. For more information, see *Siebel eService Administration Guide*. For creating troubleshooting guides and scripts for a help desk agent, see *Siebel SmartScript Administration Guide*.

Siebel Smart Answer and Siebel HelpDesk

Siebel Smart Answer uses linguistic analysis techniques and content analysis algorithms to perform natural language searches to retrieve solution data. The system has multichannel self-learning capabilities that allows it to adapt successful interactions over the Web, through email, or the Call Center.

If you plan on implementing Siebel Smart Answer, consider the following:

- Siebel Smart Answer is recommended 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 have solutions associated with available categories.
- You can train the Knowledge Base using email messages and using FAQs converted into comma-separated value (CSV) files.
- Check SupportWeb for recommendations on ways to refine accuracy for Siebel Smart Answer.

For information on set up and implementation of Siebel Smart Answer, see *Siebel eMail Response Administration Guide*.

Assignment Manager

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

Escalation and Notification

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

CTI Integration and CTI Connect

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

For more information on configuring and setting up communication middleware, see *Siebel Communications Server Administration Guide*.

Universal Queue

For more information on universal queuing, see *Siebel Universal Queuing Administration Guide*.

Automated Diagnostics Setup for Siebel HelpDesk

For Automated Diagnostics and Automated Desktop Support installation instructions, see the third-party documentation that came with SupportSoft.

Support Center Installation

Install the Support Center application on your local computer. For information about installing Support Center, see the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Foundry Synchronization

When you first start up the Foundry, you navigate to the Utilities page and synchronize actions. You then can use the Support Actions shipped with your Siebel application.

For information about synchronizing the Foundry, see the *SupportSoft* documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Foundry Implementation

The Foundry is the central repository for Support Action authoring, maintenance, and modification within the support environment of an enterprise. Therefore, it is crucial that minimal Web access security to the Foundry be implemented before final production. Access to the Foundry should be granted only to a small set of authorized users, such as support administrators and support action authors.

For information about securing the Foundry, see the documentation titled *Implementing Basic Foundry Secure Web Access* in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Script Center

Script Center is an editor that you can use to write Visual Basic and Java scripts and is used by the Foundry for automated solutions. To use Script Center, you must first install the application using the Foundry.

For Script Center installation instructions, see *Siebel Automated Solutions Installation Guide* in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

For information on using the Script Center, see the documentation titled *Building Protections* in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

DNA Editor

The DNA Editor is an editor that allows you to create and edit scripts used to install and protect applications, network and printer settings. To use DNA Editor, you must install the applications using the Foundry.

For DNA Editor installation instructions, see *Siebel Automated Solutions Installation Guide* in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Protection Building

Building a good infrastructure foundation is essential when creating effective protections.

The six-step protection-building process is described in the white paper included in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

For more information on ways to build protections, see the section titled *Building Protections* in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

CD Vault

A CD vault minimizes the amount of data stored in a user's local vault. A CD vault is useful for remote users and those users with computers that have limited hard disk space. The vault data is transferred to a CD-ROM image, which can be used at a later time to repair a computer system.

For more information on ways to build a CD Vault, see the SupportSoft documentation section titled *CD Vault* (CD_Vault.pdf) in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

SupportSoft Config File

Support Automation’s config.cfg controls the configuration of the Support Automation DNA server, Web server, Nexus information, Support.com Agent polling and posting, directory mapping, vault ordering, and so on.

For more information on the config.cfg file, see the SupportSoft documentation section titled *Purpose of the Config.cfg File* (Config_cfg.pdf) in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Config File Location

Config.cfg is located in the <install root>\support.com\global directory. While there are other config.cfg files located within the Support.com directory structure, the config.cfg files do not control Support.com Global server settings.

Config File Management

When necessary, the config.cfg should be managed through the Admin Console. The config.cfg can also be edited directly through the Support Portal Hub (Servers tab) or any text editor.

It is recommended that you make a backup copy of the config.cfg file before editing it.

NOTE: Make sure that the line returns in the file are not deleted when saving the file. If the line returns are deleted, the file is not parsed correctly and the application does not function correctly. If you notice that some features no longer work as expected after modifying the config.cfg file, check to make sure the file still includes line returns. If the line returns have been deleted, you can insert the line returns using a text editor.

Default Reports

Automated Diagnostics provides a set of default reports that generate scorecards for specific performance appraisal questions. These reports provide statistics that are typically difficult to measure. The information presented in these reports assists your organization in gathering data concerning user and analyst use of the system. Your enterprise can also configure the time frame in which the reports appear.

The Default Reports include five sections:

- **Issue Creation Report**. This report displays configured links to SmartIssues.
- **Scorecard Metrics Report**. This report summarizes SmartIssues and customer satisfaction information.
- **SupportActions Report**. This report shows available SupportActions as well as statistics on SupportActions use.
- **Analyst Report**. This reports provides details of analysts using the system.
- **User Report**. This report provides details of users who have submitted SmartIssues to the system.

Unlike Advanced Reports, Default Reports provide preconfigured information. Based on customer requests, the Default Reports have been formatted to include statistics that include the most frequently asked questions about user interaction with the system.

For detailed explanations of the five reports available at the Default Reports site and instructions for maximizing their use, see *Default Reports* (Default_Reports.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Drivers and Services Management

The following categories provide strategies for managing driver protection:

- **Out-of-the-box protection strategy**. Use the drivers and services protection scheme to protect drivers. This scheme is a standard feature of the Siebel Administration Console and protects drivers and services installed on a machine. The DNA created from this protection scheme is used to repair drivers and services on customer systems. This is the simplest strategy to implement.

- **Custom protection strategy**. Use the Administration Console to create custom protection schemes that protect individual drivers on a machine. The utility program generates a list of files referenced in a driver's *.inf file. This list of files is then used to create a custom protection scheme to protect the individual driver. The DNA created from this custom scheme is used to repair the driver on customer systems. This technique is more flexible when repairing driver problems, but takes more initial setup time.

- **Custom SupportAction strategy**. Use SupportActions to manage driver versions and known driver conflicts. Its advantage is it provides a means to test for driver versions, reinstall drivers, and update drivers. It also leverages future OS supported signed driver installation techniques. This strategy is also very flexible when repairing problems, but requires SupportAction development time.

For more information on managing drivers and services, see *Managing Drivers and Services* (Drv_Srv.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Diagnostic Information Definition Extension

Support providers can extend the Automated Diagnostic definition by capturing information unique to the supported applications and environments and the type of support services they provide.

For more information on extending the diagnostic definition, see *Extensible SmartIssues* (Exten_SI.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Healing Console Installation and Configuration

There are many ways to deploy the Healing Console to support analysts. The method you choose depends on the requirements of your organization. The methods are:

- **From the Siebel CD-ROM**. This is used to deploy the standard Healing Console to a small number of support analysts.
- **Without the Siebel CD-ROM using a script / batch file**. This method is used to deploy the Healing Console to a large number of support analysts with a modified program shortcut.
- **Without the Siebel CD-ROM using a custom administration console job**. This method is used to deploy the Healing Console to a large number of support analysts with a modified program shortcut.
- **Without the Siebel CD-ROM using a custom SupportAction**. This method is used to deploy the Healing Console to a large number of support analysts with a modified program shortcut.

After installation, the Healing Console functions are configured using the Administration Console, the configuration file, and launch control parameters. For more information on installing and configuring the Healing Console, see *Installing and Configuring the Healing Console* (HC_Config.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Automated Desktop Support and Diagnostics

Siebel Automated Desktop Support and Diagnostics products can be configured to work in environments that include proxy servers, firewalls, NATs, or other type of Internet security.

For more information, see Support.com *Technical Reports* (npconnect.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Nexus Server

The Siebel Support Automation Nexus Server is an optional component that facilitates socket-level communication between two computers in which one, or both, reside behind a firewall, Network Address Translation (NAT) router, or other type of Internet security mechanism. The Nexus server facilitates secure two-way communication and file access between systems behind a firewall and their other users that can be located behind a different firewall. In a typical enterprise deployment of the Siebel Nexus, support analysts connect to the Siebel Agent on a customer's system using a secure socket connection over direct IP. However, when a support analyst needs to connect to an end user deployed on an extranet or over the Internet, a direct IP connection may be unavailable because of firewall security issues. In this example, both the Healing Agent on the customer's system and the support analyst using the can communicate with each other through the Siebel Nexus.

For more information on using Siebel Nexus, see *Nexus Settings and Configuration* (Inside_Nexus.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Nexus Registration

For information on registering a Nexus server, see *Nexus Registration* (Nexusreg.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Vault Setup

Each Siebel Automated Solutions Server should use the default vault located in the \backup directory below the server root as its read/write vault.

This vault includes the user customizations and specific changes. Over time, it may be necessary to add additional vaults to each server. The additional vaults may be located on the same or separate machines.

For more information on setting up additional vaults, see *Inside the Vault* (Inside_Vault.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Support Automation MTS Package Setup

If you experience MTS errors, consider recreating the Support Automation MTS Package.

For more information on setting up or recreating MTS packages, see *Troubleshooting Installation, Recreating MTS Package* (MTS_Trouble.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Automated Desktop Support Installation

For Automated Desktop Support installation instructions, see the *Siebel Automated Solutions Installation Guide* (Siebel Automated Solutions Installation.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Context Response

ContextResponse Technology gathers, analyzes, and responds to information to personalize and automate the support process. Its direct interaction with the user and the system results in a support experience tailored to the user's environment and support needs. ContextResponse Technology builds on several other technologies, including DNA, SmartIssue, SupportTriggers, Context Profiles, and the SmartResult System.

DNA Technology provides each user with a personalized knowledge base of support solutions. The characteristics of each user's software applications and operating system components are identified and tracked over time. ContextResponse Technology uses this information to provide a personalized diagnosis and repair by analyzing the results of diagnostics and comparing the user's current system configuration to a previous working configuration.

SmartIssues Technology automatically gathers information that otherwise requires an interaction between the user and the support professional. For example, instead of asking the user to identify system information, ContextResponse Technology automatically gathers this data and electronically relays the information to the support professional.

SupportTriggers provide information about the user's application when a support request is initiated. ContextResponse Technology uses this information to return a relevant solution from a custom Web page.

Context Profiles make a customizable subset of SmartIssue information available to match to Profile Scripts. Only SupportActions matching the Context Profile are returned as Personalized Solutions in the User Center.

The SmartResult System combines SmartIssue information with statistical-based solution retrieval technology to guide users to solutions. Its natural language query provides users with answers that are based on the specific context of their problem without significant tuning and data structuring by the support organization on the front end.

For more information on Context Response, see *Context Response* (Context_rsp.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Process Command-Line Parameters

For more information on the command-line parameters, see *Process Command-Line Parameters* (Cmdline.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Launch Control Parameters

The launch control for Support.com WIN32 components is cont.exe. This program determines which component is executed. Specifying optional parameters also controls some features of the component.

For more information on the Launch Control parameters, see *Launch Control Parameters* (Lcp.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Automated Desktop Support and Support Triggers

There are several benefits of using the Siebel Automated Desktop Support Suite to generate SupportTriggers.

For more information on the Support Triggers, see *SupportTriggers* (SupportTriggers.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Automated Desktop Support Repair for Windows NT and 2000

TgSrvc is Siebel Automated Desktop Support Repair Service for Microsoft Windows NT and 2000 systems. TgSrvc is a service for the Support.com Resolution Suite and is associated with other Siebel Automated Desktop Support application modules, including the ActionRunner and the SmartIssue Control.

In a locked-down environment, using Siebel Automated Desktop Support software to repair registry and application files can be difficult because of user permissions. A user can have permissions on a personal network share, but not on the local system. In this example the user can only modify files in the c:\WINNT\Temp folder. Even though the user cannot modify local files or registry settings, these files and settings can be corrupted through an automatic software deployment job or application use. As a result, these files and settings, as well as those on the user's network share must be repaired. One solution to repair the files is to run a file service, TgSrvc, to change or restore locked-down local files and registry values.

NOTE: TgSrvc cannot be used to replace or repair registry keys larger than 4,096 bytes.

For more information on the TGSrvc, see *TGSrvc – Repair Service* (TGSRVC.pdf) in the SupportSoft documentation in the third-party documentation section of the *Siebel eBusiness Third-Party Bookshelf*.

Configuring Siebel HelpDesk to Use SupportSoft

You can use Siebel Tools to configure your Siebel HelpDesk to use SupportSoft.

To configure Siebel HelpDesk to use SupportSoft

1. Use Siebel Tools to set up the Diagnostic Option.

   a. Create an image control with the following properties:

      `Name = ImageDiagnostics`

      `HTML Bitmap = HM_PG_FORM_LIBRARY`

      `HTML Display Mode = EncodeData`

      `HTML Type = ImageButton`

      `Method Invoked = GotoUrl`

      `Visible - Language Override = Y`

   b. Add a User Property to the ImageDiagnostics controls with the following properties:

      `Name = Url`

      `Value = http://localhost/siebel/diagnostics.asp`

   c. Create a link control with the following properties:

      `Name = LinkDiagnostics`

      `Label = Diagnose a Problem`

      `HTML Display Mode = EncodeData`

      `HTML Type = Text`

      `Method Invoked = GotoUrl`

      `Visible - Language Override = Y`

   d. Add a User Property to the LinkDiagnostics controls with the following properties:

      `Name = Url`

`Value = http://localhost/siebel/diagnostics.asp`

e Create a label control with the following properties:

`Name = LabelDiagnostics`

`Label = Diagnose a problem with your IT equipment`

`HTML Display Mode = EncodeData`

`HTML Type = Label`

`Visible - Language Override = Y`

2 Use Siebel Tools to set up the Quick Fix Option.

a Create an image control with the following properties:

`Name = ImageQuickFix`

`HTML Bitmap = HM_PG_TROUBLESHOOT`

`HTML Display Mode = EncodeData`

`HTML Type = ImageButton`

`Method Invoked = GotoUrl`

`Visible - Language Override = Y`

b Add a User Property to the ImageQuickFix controls with the following properties:

`Name = Url`

`Value = http://localhost/siebel/quickfix.asp`

c Create a link control with the following properties:

`Name = LinkQuickFix`

`Label = Fix an Application`

`HTML Display Mode = EncodeData`

`HTML Type = Text`

`Method Invoked = GotoUrl`

```
Visible - Language Override = Y
```

d Add a User Property to the LinkQuickFix controls with the following properties:

```
Name = Url
Value = http://localhost/siebel/quickfix.asp
```

e Create a label control with the following properties:

```
Name = LabelQuickFix
Label = Fix an application or a system setting
HTML Display Mode = EncodeData
HTML Type = Label
Visible - Language Override = Y
```

For more information on using Siebel Tools, see *Siebel Tools Reference*.

Setting Up Employee Self-Service 11

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 processes. For examples of forms, see Appendix A, "Employee Self-Service Reference."

Business Scenario for Employee Self-Service

This scenario provides an example of processes performed by a Human Resources department administrator and Human Resources representatives. Your company may follow a different process according to its business requirements.

Administrator

The Human Resources administrator for a financial organization spends a lot of time entering information collected on employee transaction forms into the company's databases. Because the administrator designs and administers the forms for the HR department, she receives queries from employees uncertain about which fields in the forms are relevant to the particular transaction. She also notes that some users complete too many fields in the form, and others leave required fields uncompleted, which results in the forms being returned to the employees for amplification.

To resolve these problems, the HR administrator uses Employee Self-Service to implement a process that can handle personnel actions, which include changes in the employee's business title, division, position, manager, location, and so on. In this example, the Personnel Action Form (PAF), is available preconfigured in Employee Self-Service. The personnel action form is typically used by managers to request changes for a person reporting to them, or for a prospective report.

Manager

A manager at the organization wants to promote one of her direct reports. She logs in to her Siebel application and navigates to the HelpDesk, which provides a link to the Employee Self-Service forms library. She finds the link for the Personnel Action Form (PAF) and reviews the screens adding information when necessary. She submits the form, which is automatically routed for approval.

Approver

The organization's approvers—line managers, HR representatives, and functional groups—must accept the employee change before it can be implemented.

When the final approval is acquired, the Siebel ERM application sends the updated data to the appropriate systems.

Employee

The promoted employee logs in to the Siebel application. He navigates to his employee profile and sees that his title has changed.

Example Process for Employee Self-Service

Figure 18 on page 217 shows the process an administrator and an end user might follow to set up and use Employee Self-Service. Your company may follow a different process according to its business requirements.

Administrator Procedures

An administrator can import and customize preconfigured forms and create new forms. As Figure 18 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.

Use Employee Self-Service to perform the following tasks:

- **Import a preconfigured form.** For more information, see “Importing a Preconfigured Employee Self-Service Form” on page 221.
- **Customize a preconfigured form.** For more information, see “Customizing a Preconfigured Self-Service Form” on page 223.
- **Create a requestor form.** For more information, see “Creating an Employee Self-Service Requestor Form” on page 224.
- **Create a summary form**. For more information, see “Creating an Employee Self-Service Summary Form” on page 230.
- **Linking self-service forms**. For more information, see “Linking Self-Service Forms to the Approvals Inbox” on page 233.
- **Release, test, and rerelease forms.** For more information, see “Releasing and Testing Employee Self-Service Forms” on page 236.

End-User Procedures

The end-user process has a single path for requestors. As Figure 18 shows, the first item in the process is for a requestor to choose a form. The process leads to the type of changes the requestor wants, after which the submit process is activated. The form is then routed to the approver’s Unified Approvals Inbox.

Use Employee Self-Service to perform the following tasks:

- **Access, complete, and submit forms.** For more information, see "Accessing and Submitting Self-Service Forms (End User)" on page 237.

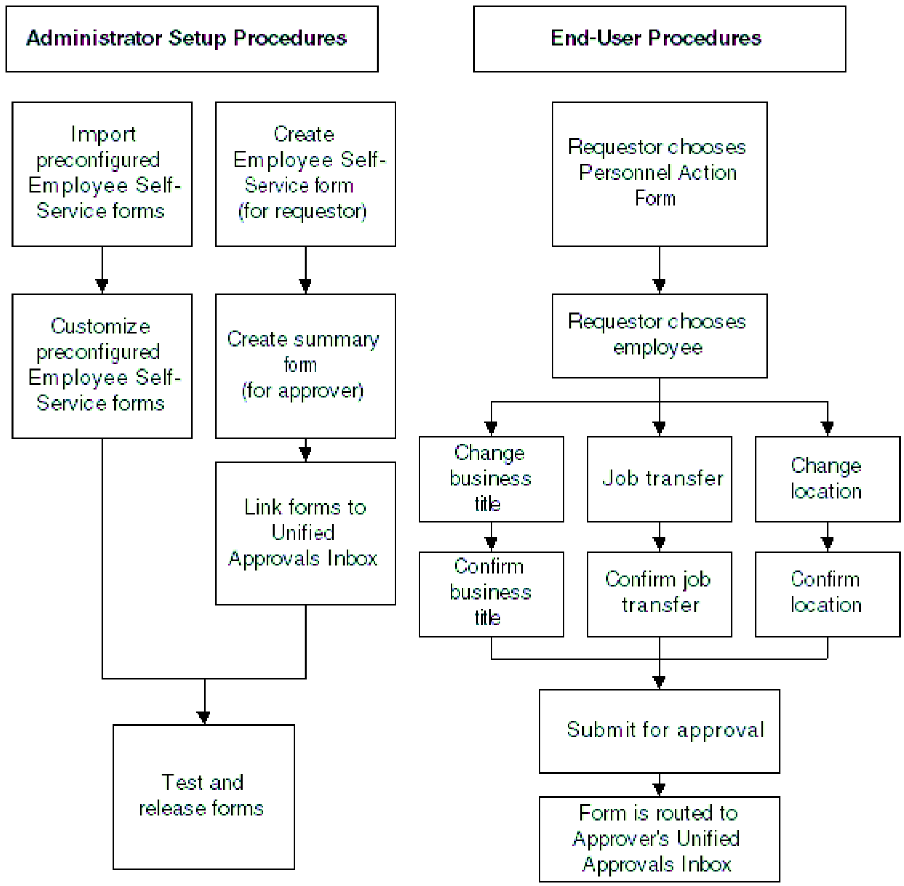

Figure 18. Business Process for Employee Self-Service

Creating 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 19, 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.

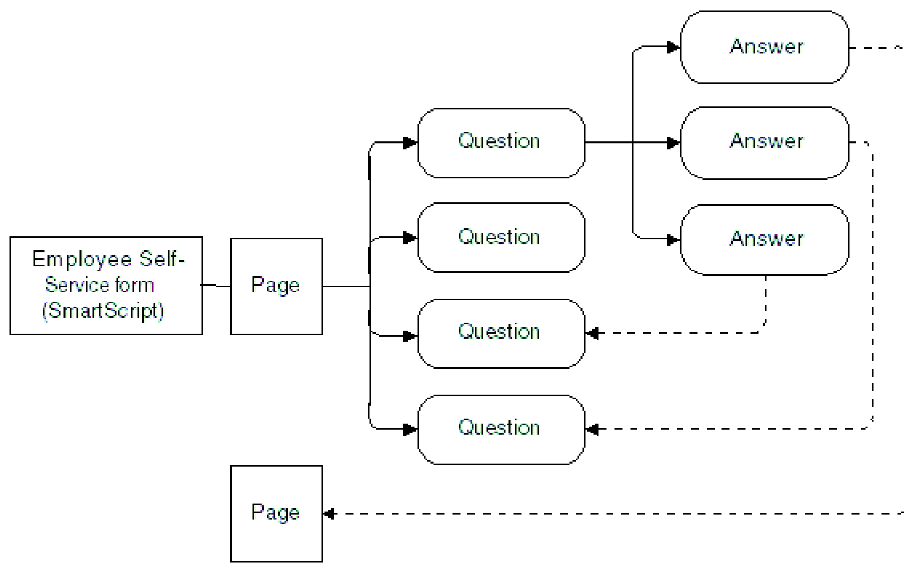

Figure 19. Example of Branching Logic for Employee Self-Service

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 prepopulated 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 Unified Approvals Inbox functionality to create an Approvals process that automatically routes the form to specific users for approval. Based on the data entered in the form, updates can be made to your Siebel application or another application. For more information, see Chapter 12, "Setting Up Unified Approvals Inbox."

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 15 describes the preconfigured forms for Employee Self-Service and the types of changes addressed in each form.

Table 15. Preconfigured Employee Self-Service Forms

Form	Comments
Personnel Action Form	This form is used for changes to: ■ business title ■ job transfer (Position/Manager/Division Change) ■ location
Personal Data Form	This form is used for changes to: ■ name ■ address ■ telephone number
Time Off Form	This form is used for vacation and other time-off requests

To import a preconfigured employee self-service form

1 Export the desired forms (SmartScripts) from the sample database.

- **a** Log in to your Siebel application using the sample database.
- **b** From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
- **c** In the Scripts list, select one of the following forms (SmartScripts) to export to your production environment:
  - ❑ Personnel Action Form (PAF)
  - ❑ Personal Data Change

- Time Off Request

d In the Scripts list, click the menu button, and then choose Export Script.

The Export Script form appears.

e 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 b through Step e for each form (SmartScript) you want to use in your production environment, and then log out of your Siebel application.

2 Import the desired form to the production environment.

a Log in to your Siebel application again, using the production database.

b From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.

c In the Scripts list, click the menu button, and then choose Import Script.

The Import Script form appears.

d From the In case of error drop-down list, select Update.

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.

---

e In the File Name field, click the select button.

f In the Add Attachment dialog box click Browse, and then select the form (SmartScript) you previously saved in Step 1 on page 221.

g When the Add Attachment dialog box appears with the name of the selected file, click Add.

h In the Import Script form, click Import File.

i Test and release the script.

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.

To customize a preconfigured employee self-service form

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, query to find the script you want to change.
3. Select the script, and then click the Designer view tab.

   The graphical layout for the preconfigured form appears.
4. 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 236.

NOTE: For more information about updating a SmartScript, see *Siebel SmartScript Administration Guide*.

Creating an Employee Self-Service Requestor Form

The Employee Self-Service Requestor Form is used by a manager or an employee to request a change in employment information. The change might be a personnel action such as a promotion, or a change to an employee's marital status. Requestor forms are grouped in the Forms Library, which is accessible from the HelpDesk home page.

As an administrator, you can use Siebel SmartScripts to define the requestor forms used within your application. Before you define a form, verify that the following prerequisites are met:

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

Before you begin

Before you 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*.

Design on paper the requestor form you want to create. Use the flow diagram example shown in Figure 19 on page 219 to determine the pages to include within your form (SmartScript), and the questions you want to include in each page.

To create a form for a requestor

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, add a new record and complete the fields.
   a. In the Name field, enter a name for the script.

b In the Type drop-down list, select Employee Self-Service.

NOTE: 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.

---

c In the First Page field, click the select button.

d In the Pick Page list, select the first page you created for the form, and then click OK.

e Complete the remaining fields as needed.

3 Click the Designer view tab.

The graphical editor appears.

4 Insert questions and pages as needed from the set that you previously created.

To route the submitted forms to the Unified Approvals Inbox, see "Linking Self-Service Forms to the Approvals Inbox" on page 233.

NOTE: For tips on using eScript to enhance a requestor form, see "Effective Scripting for Employee Self-Service Requestor Forms" on page 226.

---

5 Release the script, test it, and, if necessary, make changes and re-release the script.

For more information, see "Releasing and Testing Employee Self-Service Forms" on page 236.

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*.

Making a Field Read-Only.

You may want to make some fields in a requestor form read-only to provide information to requestors, but prevent them from making any changes to the data in the field.

To make a field read-only in a requestor form

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, query to find the Employee Self-Service form (SmartScript) you want to modify.
3. Click the Programs view tab.

   The scripting area appears.
4. In the Programs list, select Script_Open.
5. In the Program Language drop-down list, select eScript, and then click Save.

   In the Scripts 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. Click the Check Syntax button to highlight 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 your 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. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, query to find the script you want to modify.
3. Click the Programs view tab.

   The scripting area appears.
4. In the Programs list, select Script_Finish.
5. In the Program Language drop-down list, select eScript, and then click Save.
6. In the Script 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 ();

   }
   ```
7. To make sure that users' data entries are always saved, whether the form is complete or incomplete, in the Save Session field select Always.

   Choose Finished to save users' data entries only when the form is completed.

   NOTE: Selecting Finished or Always from the Save Session field forces your Siebel application to write the values to the SmartScript session tables.

   ---

8. Click the Check Syntax button to highlight any syntax issues.
9. In the Programs list, click Save.

Populating a Field in a Form

You can use eScript to automatically populate a form.

To populate a field in a form

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, query to find the script you want to modify.
3. Click the Programs view tab.

   The scripting area appears.
4. In the Programs list, select Script_Open.
5. Use the eScript function SetCurrentValue for each field you want to populate.
6. Click the Check Syntax button to locate any syntax issues.
7. In the Programs list, click Save.

Creating an Employee Self-Service Summary Form

A summary form is used to provide a read-only, summary version of a completed form to an approver. The approver can review the information in a summary form, and then decide whether to approve or deny the request. As an administrator, you can use the Employee Self-Service module to create a summary form.

Before you create a form, map out the summary form you want to create. Use the flow diagram example shown in Figure 19 on page 219 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.

Before you begin

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*.

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.

To create a summary form for an approver

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. Create a new Script.
   - **a** In the Scripts list, add a new record, and enter a name in the name field.

     The name should identify the form as a summary form. Do not use the same name as the requestor form.

b. 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.

c. Complete the remaining fields as needed.

3. When the script record is created, click the Programs view tab, and add a new program record.
4. In the Name field, choose Script_Open from the drop-down list.
5. In the Program Language field, choose eScript from the drop-down list.
6. Use eScript (or VBScript) to set up the summary form.
7. After you finish scripting, release the script, test it, and then make necessary changes and re-release the script.

Importing Field Values to a Summary Form

After the summary form is filled in and submitted by the user, the questions and answers are saved in SmartScript session table. For a summary form, the Script_Open script is used to read the values and assign them to the questions.

To import field values from requestor to summary form (without page breaks)

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, query to find the script you want to modify.
3. Click the Programs view tab, and in the Programs list, select Script_Open.

4 In the Program Language drop-down list, select eScript.

> **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. See the comment, Get the handles to the page and the questions, in the "Example eScript for Summary Form" on page 307.

5 To set a question to read-only, use the eScript function SetQuestionEnable(false) at Script_Open.

For more information, see "To make a field read-only in a requestor form" on page 227.

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

For more information on using GetParameter, see "Example eScript for Summary Form" on page 307.

7 Query for the Call Scripts business object with Call Script Run Answers business component.

For more information on ways to get the Call Scripts business object, see "Example eScript for Summary Form" on page 307.

8 In the Programs list, click Save.

Linking Self-Service Forms to the Approvals Inbox

To route an employee self-service form to the Unified Approvals Inbox, the form and the inbox must be linked. Figure 20 shows the business process used when linking the form and inbox.

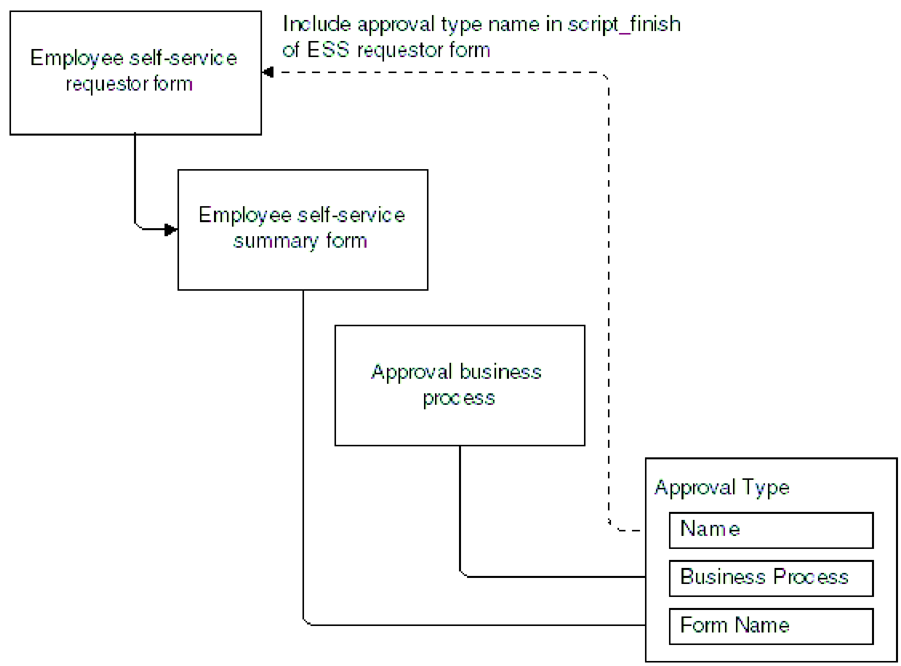

Figure 20. Linking Employee Self-Service Form to Unified Approvals Inbox

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 Chapter 12, "Setting Up Unified Approvals Inbox."

Use the following procedure to link an employee self-service form to an existing approval type.

NOTE: This 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 "Creating an Employee Self-Service Requestor Form" on page 224.

To link employee self-service forms to the Unified Approvals Inbox

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, query to find the Employee Self-Service form (SmartScript) you want to link to the Unified Approvals 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 Scripts form, enter the script as shown in "Example eScript for Requestor Form" on page 305.

   NOTE: The Scripts form appears at the bottom of the screen. You may need to scroll down to see the complete form.

5 In the Script field, change the indata.SetProperty (“ItemType”, ““) parameters as needed.

The second parameter of the function should equal the name of the appropriate approval type. For example:

```
// Approvals Inbox Administration screen

indata.SetProperty ("ItemType", "PAFChange");
```

NOTE: For more information on approval types, see Chapter 12, “Setting Up Unified Approvals Inbox.”

---

6 Click the Check Syntax button to highlight any syntax issues.

7 In the Programs list, click Save.

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.

To release a script

1. From the application-level menu, choose View > Site Map > SmartScript Administration > Scripts.
2. In the Scripts list, select the script, click the menu button, and then choose Release.
3. Test the form to make sure that it works as desired.

   For more information, see "Accessing and Submitting Self-Service Forms (End User)" on page 237.

   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 223.

   ---

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 User)

End users can access forms in the Self-Service area of the Help Desk home page, or from the Employee Self-Service tab on the site map. After a user selects the appropriate form, the form can be completed and submitted for approval.

NOTE: As an administrator, you can use this procedure to test the forms before final release.

Accessing Self-Service Forms

End users can access self-service forms using the Help Desk home page.

To access an employee self-service form

1. Navigate to the HelpDesk home page.
2. From the Show drop-down list, select Forms Library.
3. In the Available Forms list, drill down on the hyperlink 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: Both incomplete and complete forms can be saved and submitted at a later time. 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 Unified Approvals 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 list, click Forms Library.

3 From the Show drop-down list, select My Saved Forms.

4 In the Saved Forms list, select the form you want to access.

5 Click Resume to continue filling out the form.

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 your myPage screen.

2 From the Show drop-down list, select My Submitted Items.

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.

   To see the entire form, including your answers to questions, navigate to the My Finished Forms view within the Forms Library.

Setting Up Unified Approvals Inbox 12

The Unified Approvals Inbox feature allows managers and employees with review responsibilities to view and act on approval requests from a single unified screen. Approvals Inbox also allows administrators to create and manage approval flows. This section describes the Unified Approvals Inbox and explains setting up and managing approval flows for forms generated within the Employee Self-Service application.

Unified Approvals Inbox Overview

The Approval Inbox provides a unified view of the approval items requiring manager response. As an administrator, you use preconfigured workflows and scripts to set up different approval items that are generated within the Employee Self-Service application.

Using the Siebel Unified Approvals Inbox, you can specify business process (workflow) logic to define where Employee Self-Service items need to be routed for approval. The graphical workflow editor allows you to define multiple stages of approvals required for an item. The approval process can be designed to branch to the next step based on preset decision criteria. After final approval is received, updated data can be sent to the underlying Siebel database and external databases through the appropriate connectors.

An administrative screen allows you to specify approval item types and the associated workflow processes. When the specified type of object appears in the Siebel Unified Approvals Inbox, it is routed automatically according to the workflow process you defined.

Forms from the Employee Self-Service application can be shown as approval items in a user’s Approvals Inbox.

Business Scenario for Approvals Inbox

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

Administrator

The Human Resources manager at a company has outlined new time off policies for employees. Management has mandated that personnel change requests be filed electronically. An HR representative for the employee's department must first check and approve the request, followed by an approval from the employee's immediate supervisor, and the departmental vice president. This new policy is handed off to a Siebel administrator for implementation.

After using the Employee Self-Service feature to set up and activate the preintegrated Personnel Action Form (PAF), the administrator designs the approval flows for the business object. Using the Approvals Inbox, the administrator creates the required approval type, and approval flow. When a user requests an approval for this particular item, the approval type created by the administrator invokes the approval workflow process.

End User

An employee at the company submits a Request for Time Off form. The form is routed to the human resources representative, then the manager, and finally the vice president of marketing. Each approver can reject the form and send it back to the requestor. If approved, the process flow results in an update of data fields.

Example Process for Approvals Inbox

The following section describes the processes an administrator and an end user might follow to set up the Unified Approvals Inbox. Your company may follow a different process according to its business requirements.

Administrator Procedures

The Siebel administrator requires administrative responsibilities to:

1. **Create requestor and summary forms.** The administrator creates the Requestor and Summary Self-Service forms as described in Chapter 11, "Setting Up Employee Self-Service."

2. **Create the approval business process**. For more information, see "Creating an Approval Business Process (Workflow)" on page 242.

3. **Create the Approval Type.** For more information, see "Creating an Approval Type" on page 243.

4. **Reference the Approval Type.** For more information, see "Referencing an Approval Type in a Requestor Form" on page 245.

End-User Procedures

The end user, an employee, manager or approver, uses Employee Directory to:

1. **Review Submitted Items.** The end user reviews submitted items, For more information, see "Reviewing Submitted Items (End-User)" on page 247.

2. **Take Action on submitted items.** The approver approves or rejects the submitted items. For more information, see "Approving and Rejecting Submitted Items (End User)" on page 248.

3. **Review approved items.** The employee or manager reviews approved items. For more information, see "Reviewing Approved Items (End User)" on page 249.

Creating an Approval Business Process (Workflow)

The approval business process defines the exact sequence that an approval item must follow. Administrators can define business services, sub-processes, and decision steps within the business process, to build detailed approval flows. For more details on building business processes (workflows), see *Siebel Business Process Designer Administration Guide*.

To create an approval business process (workflow)

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. Create a new workflow record, design the workflow, and then save the record.
3. Activate the workflow.

Creating an Approval Type

The approval type is the link between Employee Self-Service Forms (and other items requiring approval) and the Unified Approvals Inbox. The approval type record can be associated with different approval items. This allows a single business process to be shared among many different approval items.

Before creating the approval type to be used with a approval business object, the appropriate business object must be created and defined. Siebel ERM is preconfigured with several business objects that your organization can use. For more information on using a preconfigured form, see Chapter 11, "Setting Up Employee Self-Service." You can also create a new business object to use with Siebel Unified Approvals Inbox. For more information on creating a business object, see *Siebel SmartScript Administration Guide*.

NOTE: This approval type name must be referenced within the Script_Finish of the Employee Self-Service Requestor Form to link the form with the Unified Approvals Inbox.

To create an approval type

1. From the application-level menu, choose View > Site Map > Approvals Inbox Administration > Approval Types.
2. In the Approval Types list, add a new record and complete the fields.

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

Field	Comments
Business Object	Select a business object for this approval type (optional).
Business Process	Specify the approval business process to use. Use the approval business process you created.
Comments	Enter a brief description to describe the approval type.
Default Queue Duration	Enter a default queue duration for this approval type (optional).
Form Name	Specify the Employee Self-Service Summary Form here.

Field	Comments
Integration Object	Select an integration object for this approval type (optional).
Name	Enter a descriptive name for the approval type. This name must be referenced within the Script_Finish of the Employee Self-Service Requestor Form.
Status Type	Select a status type for this approval type (optional).
View	For employee self-service forms, use EmpSS Form Player View.

Referencing an Approval Type in a Requestor Form

After the approval type is configured and the employee self-service form is created, you can reference the approval type name within the employee self-service requestor form. For information about referencing an approval type within the employee self-service requestor form, see "Linking Self-Service Forms to the Approvals Inbox" in Chapter 11, "Setting Up Employee Self-Service."

Linking the Approvals Inbox to a Non-ESS Process

The Unified Approvals Inbox can also be linked to items other than Employee Self Service processes using the Universal Inbox business service.

There are three ways to link to this business service:

1. Runtime events (at the Object Manager level)
2. Workflow monitor
3. Business component-level server script

The business service has two Universal Inbox methods, Initialize (<IN> Argument, <OUT> Argument), and Route to Approver. The route to approver method is typically used when the approver is known, as it reduces the need for an additional workflow.

Reviewing Submitted Items (End-User)

Use the following procedures to review submitted forms, and items that previously were approved or rejected.

To review a submitted form

1. Navigate to the myPage screen, and from the Show drop-down list, select My Submitted Items.

   Choose My Team's Submitted Items from the Show drop-down list, if you are reviewing items for your team.

2. In the Submitted Items list, click the Name hyperlink of the form you want to review.

   The selected summary form appears.

Requestors and managers can trace previous approvers of an item using the History view tab. The History view provides:

- Information on the previous approvers
- The date on which the approvers approved the item
- Comments approvers have inserted

Administrators also have access to All Submitted Items, which includes items in the organization submitted for approval.

Approving and Rejecting Submitted Items (End User)

Managers can approve or reject items that are sent to them for approval.

To approve or reject an employee self-service form

1. Navigate to the myPage screen.
2. From the Show drop-down list, select My Approval Items or My Team's Approval Items.
3. In the Approval Items list, select the item you want to approve or reject.

   NOTE: You can click the Name hyperlink to review the summary form.

4. In the Status field, select Approved or Rejected.
5. (Optional) In the Comments field, enter a brief explanation.

   The record is routed appropriately based on your action.

Reviewing Approved Items (End User)

The History view lets managers track the progress of the items through each stage of the approval process. Managers can review the approval decision and comments made by each approver. Administrators also have access to All Approved Items, which includes items in the organization that have been approved.

To review items that have been previously approved

1. Navigate to the myPage screen.
2. From the Show drop-down list, select My Approved Items or My Team's Approved Items.
3. In the Approved Items List, select the item you want to review.

NOTE: Click the Name hyperlink to review the summary form. You cannot change the approval decision at this point.

Setting Up Siebel Projects 13

Siebel Projects is a Siebel module that provides a shared company workspace that employees within an organization can use to organize, coordinate and manage formal and ad-hoc project assignments with other employees, regardless of physical location. Employees, managers, and executives can collaborate to create, staff, manage, calibrate, and achieve overall company objectives.

This chapter describes setting up and managing the features in the Siebel Projects module.

Managing Projects Collaborations

Siebel Projects centralizes key project information including membership, project schedules and milestones, activity assignments and delivery dates, project commentary and notes, and the most current project presentations, business models, competitive reports, emails, and marketing collateral.

Siebel Projects includes the following features:

- Shared workspace and file storage
- Project summary pages
- Project KPIs
- Threaded discussions
- Shared project calendar
- Project member availability scheduling
- Attribute-based project staffing
- Access control
- Syndicated news content
- Time and expense report integration
- Virtual meeting and instant messaging integration
- Activity delegation and alerts
- Project activity charts
- Ad-hoc performance reviews

Business Scenario for Siebel Projects

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

Projects Administrator

A projects administrator for a software company is asked to help plan and implement his organization's new corporate marketing program. The global campaign requires the development of numerous cross-functional projects. The administrator designs an activity template that can be used by other Siebel Projects users to create individual activity plans that incorporate the activities necessary to manage the marketing campaign rollout. He assigns the template to Projects, allowing access to anyone using the Siebel Projects application. The administrator then creates a series of corresponding activities with suggested start and end dates and descriptive information. The administrator then sets up virtual collaboration and the Project Home and Project Summary pages.

The administrator launches the campaign by giving an overview presentation to the designated global project leads, using the virtual collaboration application within Siebel Projects. The administrator explains how each project moderator can create a cross-functional project plan to execute and manage the rollout for each geographic region. The administrator demonstrates that after a project is created and staffed, the project lead can develop an plan to complete the project objectives by selecting the marketing rollout activity template from the Projects screen's Activity Plan view. Once selected, the activity template automatically displays the associated activities and completion timeframes for the campaign. Each project moderator can then assign activities to the appropriate project members.

Project Moderator

A project moderator at a financial organization is asked to coordinate a cross-functional project to develop a series of APIs that will 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. He selects the General Engineering project and then a sub-project called Future Product Requirements. The moderator creates a new project, enters the key project details and sets the project's delivery status and access type to convey the health of the project and visibility rights. Finally, the moderator adds a graphic to the Project Summary page to personalize the project.

After the project is created, the moderator staffs the project using employees with the appropriate skills. The manager then accesses the Activity Plans tab and selects an activity plan template that automatically creates a series of activities and tasks for the project. He enters a few additional activities, and then assigns the activities to the project members so they can begin working the project.

Project Member

A product marketer has been added to a project to develop a series of APIs for her organization's software project. This project is a cross-functional, global project and includes employees located in several different countries and time zones. The marketer uses Siebel Projects to pose questions, obtain answers, and share information and best practices with the projects team members.

The product marketer accesses the Project Summary page of this project and reviews key project information such as project description and objectives, key project indicators, project news, related projects, new project notes, and activities that help her to understand the project and her individual responsibilities.

Example Process Flow for Siebel Projects

The following section describes the process administrator and manager might follow to set up Siebel Projects. Your company may follow a different process according to its business requirements.

Administrator Setup Process

The Siebel administrator requires administrative responsibilities to:

1. **Set up project activity plans and activities.** The administrator creates project activity plan templates with associated activities to maintain project consistency across the entire organization. For more information on setting up activity plans, and assigning the activities to projects, see and *Applications Administration Guide*.
2. **Set up virtual collaboration.** The administrator sets up virtual collaboration within Siebel ERM to allow coworkers to communicate in real time over the Web. For more information, see "Virtual Collaboration and the Project Center" on page 258.
3. **Set up Project page layouts.** Administrators use the Microsite Management feature to configure and manage the layouts for the ERM Project Home and ERM Project Summary pages. For more information, see "Project Summary and Project Center Pages" on page 260, and *Applications Administration Guide*.

End-User Process

The end user, a project moderator or member, with appropriate responsibilities, uses Employee Directory to:

1. **Create a new project.** For more information, see "Browsing Projects Using Explorer (End User)" on page 261 and "Creating Projects (End User)" on page 262.
2. **Add team members.** For more information, see "Adding Project Team Members (End User)" on page 263.
3. **Adds information and activities.** For more information, see "Creating a Project Activity Plan (End User)" on page 264 and "Adding a Description to the Project Summary (End User)" on page 265.

4. **Update project progress.** For more information, see "Updating and Tracking Project Information (End User)" on page 266.

5. **Add a graphic to the project summary page.** For more information, see "Adding Graphics to Project Summary Pages (End User)" on page 267.

6. **Adding News Content to the Summary Page.** The project member adds content to the Project Summary page. For more information, see "Adding News Content to a Project (End User)" on page 268.

Creating 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 more information on activity templates, associated activities, and activity assignment, see *Applications Administration Guide*.

To create an activity template for projects

1. From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
2. In the Activity Templates list, add a new record.
3. In the Types field, select Project from the drop-down list.

   The Types field specifies where you want the template to be available.
4. Complete the rest of the fields.

To create activities for the project activity template

1. In the Activity Template list, select the project activity template, and click the Activity Template Details view tab.
2. In the Activity Template details form, click New.
3. In the Type field, choose an activity type.

   For example, for a project-related activity type, you might choose Project - Design, Project - Deployment, or Project - Management.
4. Complete the remaining fields.

   For more information about activity templates and field descriptions, see *Applications Administration Guide*.

Virtual Collaboration and the Project Center

Integrating synchronous, real-time collaboration applications into the Project Center page allows project users to collaborate with each another in real time over the Internet or your organization's intranet. Integrated applications can include third-party applications or another Siebel application such as Distance Learning.

The Project Center page incorporates a collaboration section which includes a set of predefined virtual collaboration views. When these views are set up, the user is automatically logged into the virtual collaboration application.

During virtual collaboration setup, portal agents retrieve data by sending HTTP requests to external applications. The HTML results appear in the Siebel application or in a Siebel Web page.

Portal agents are administered using the Integration Administration screen and associated views. These views allow you to define the external host, the ways that links should be handled, and to specify the HTTP request that is sent to the external host.

For more information on setting up portal agents, see *Siebel Portal Framework Guide*.

Process Guidelines for Setting Up Virtual Collaboration

Use the following process guideline to set up virtual collaboration in Siebel ERM:

- **Define content fixup**. Links that appear in third-party Web applications may be inappropriately configured for display in another application, such as your Siebel application. For example, the links in an instant-messaging application may be defined as relative links. If you include these links in the Project Center page the links do not work. The Fixup Administration view allows you to define how links embedded within external HTML content should be rendered in the Siebel user interface. Your Siebel application is preconfigured with several fixup types, however, you can define a new one for your needs.

- **Define the external host**. You define the external data hosts in the Host Administration view. Defining the external host allows you to also create symbolic URLs to reference the external host, such as SSO Server, rather than typing in the specific host information. This is useful because you can have multiple symbolic URLs that reference the same external data host. If the external host information changes, you only need to change the server location in the Host Administration view rather than edit each symbolic URL. This view allows you to:
  - maintain external host names in a single place
  - specify NCSA Basic authentication credentials
  - define how links should be handled (fixed-up) after external HTML content is rendered
- **Define Web applications**. Web applications allow multiple Symbolic URLs to send requests to the same Web application and share the same session. This is useful if you have two different applet controls that use Symbolic URLs to submit requests to the same Web application. You can associate these Symbolic URLs to a single Web application and define whether or not 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.

Project Summary and Project Center Pages

The Siebel Projects module includes two preconfigured project pages, Project Home and Project Summary, that include information relevant to employees' projects. Administrators use the Microsite Management feature to configure and manage the layouts for these pages, adding links to other Siebel applications, other Siebel portal pages, or important messages. For more information on managing the content and layout for the Siebel project pages, see *Applications Administration Guide*.

Project Home Page

The Siebel Project home page (the Project Center page) provides employees, managers, and executives with an overview of their projects, highlighting key project information such as delivery status, and new activities that have been assigned to them across all their projects. The Siebel Projects home page also acts as a platform for integrating real-time collaboration technologies, such as online meetings and presentation capabilities from Siebel Distance Learning or instant messaging and conferencing services.

When your organization subscribes to Siebel eContent Services, you can access Siebel application-hosted data to personalize the delivery of external news content to the Siebel project pages. Siebel application-hosted data consists of company profiles, corporation relationship information, premium external news feeds, and productivity content from content producers and providers. For more information on setting up external news content, see Chapter 9, "Setting Up eContent Services."

Project Summary Page

The Siebel Project summary page provides employees with a summary view of events occurring within a particular project. The project summary page provides specific performance indicators, as well as a forum for conveying project objectives, highlighting required actions, delivering information, and providing relevant third-party news.

Browsing Projects Using Explorer (End User)

The Projects Explorer provides a hierarchical view that allows the user to browse the organizational structure of existing projects in the left view of the screen, and see details for the selected project in the view at the right side of the screen.

To browse projects using Project Explorer

1. Navigate to the Projects screen, and from the Show drop-down list, choose Explorer.
2. In the Explorer list, drill down on the Project hierarchy to view existing projects.

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.

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.

To delete a project

1. From the application-level menu, choose View > Site Map > Data Administration > Projects.
2. In the Projects list, select the project you want to delete.
3. Click the menu button, then choose Delete Record.
4. Click OK to confirm the deletion.

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.

To add project members

1. Navigate to the Projects screen, and in the Projects list, select the project.
2. Click the Members view tab, and in the Members list, click New.
3. From the Add Employees dialog box, select team members, and then click OK.
4. In the members list, select the primary member of the team, and then click the check box in the Primary field.

   You must step off the record to save the change from the default primary member to the new primary member.

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.

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 Activity Plans view tab.
3. In the Activity Plans list, create a new record.

   The Planned Start field is automatically populated with a default date and time. Change these values if desired.
4. In the Template field, select the activity template.

   To appear in the template list, the activity template type must be set to project. For more information, see "Creating Project Activity Templates and Activities" on page 257.
5. In the Activity Plans list, click Save, and then click the Activities view tab to review activities associated with the activity plan template.

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 it 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.

To add a project description

1. Navigate to the Project Summary page of the project to which you want to add a description.
2. Click the View Details button.
3. In the Project form, click the show more button to expand the form.
4. Click in the Description field.

   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*.

5. When finished, click the View Summary button.

   The description appear in the Project Summary page.

Updating and Tracking Project Information (End User)

Use the Project Summary and Project Center pages, and other views such as Notes, and Tasks to review progress, and update project status, information and initiatives.

To add or view project information

1. Navigate to the Projects screen, and in the Projects list, select the project.
2. Perform any of the following action:
   - Click the appropriate view tab to add or view information about the project.
   - Click View Summary to display the Project Summary view, and then click View Details to add information.
   - Click the Projects global link to open the Project Center, then click on the hyperlinks 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.

To add a project graphic

1. Navigate to the Projects screen, and in the Projects list, select the project.
2. In the Project form, click the select button in the Project Summary Graphic field.
3. In the Image Attachments dialog box, click New.
4. 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.
5. Click Save.

   The image name appears as a record in the Image Attachments dialog box.
6. In the Primary field, select the check box, and then click OK.
7. In the Project form, click the View Summary button to review the image on the Project Summary page.

Adding News Content to a Project (End User)

Siebel ERM applications are already integrated with Siebel eContent Services, an online news and information subscription service that accesses information from several industry news services. When your organization subscribes to Siebel eContent Services, you can personalize the delivery of external news content to specific sections within your project pages.

Creating a News Topic

You can use eContent Services to create news topics, which are records that specify the search criteria used to find current news on topics relevant to your project. For more information about creating a news topic, see Chapter 9, "Setting Up eContent Services."

Adding a News Topic

After the appropriate news topics are created, you can add the news topics to your project. Siebel Projects application uses the news topics you add to the project to retrieve relevant news stories and include the links in the Project News section on your Project Summary page.

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 appears in your Project Summary page, add it to the Project Summary layout.
   a. Click the Edit Layout button.
   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. In the Project form, click the select button in the Project News field.
5. In the Related News Topics dialog box, click New to add a news topic.

NOTE: You can also remove exiting topics from your Project Summary page by selecting the topic, and clicking Delete.

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6. In the Add News Topics dialog box, query to find the news topic you want to add, and then click Add.
7. Click OK to add the news topic to the Related News Topics dialog box.
8. When finished, click the View Summary button.

   The selected news topics appear in the Project News section.

Setting Up Expenses and Timesheets 14

Administrators are responsible for creating types of expenses and activities available to users for creating expense reports and time sheets, creating global mappings between activities and expense report categories, and setting up expense report time periods. This chapter describes basic setup procedures for using expenses and timesheets with Siebel ERM.

An administrator is also responsible for creating state models, which are used for determining the appropriate status for an expense report and time sheet. For more information on expense reports and time sheets, see *Siebel Professional Services Automation User Guide*. For more information on state models in general, see *Siebel Business Process Designer Administration Guide.*

Creating Expense Types and Establishments

Your Siebel application comes with default expense types and associated establishments. These types and establishments appear in picklists in the expense report views.

For instance, you will see an expense type called Airfare and associated establishments such as Air Canada and British Airways. You can add new expense types and new establishments to suit your company's expense report needs.

In the List of Values Explorer, EXP_ITEM_ESTAB is a child of EXP_ITEM_TYPE.

To create a new expense type

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. In the List of Values list, click the menu button and choose New Query.
3. In the Type field, select EXP_ITEM_TYPE from the drop-down list. Click the menu button, and then click Run Query.

   All existing expense types appear.
4. In the List of Values list, add a record.
5. In the List of Values form, select EXP_ITEM_TYPE in the Type field.
6. In the Display Value and Language Independent Code field, enter the name of the new expense type.
7. In the Translate field, click the check box.
8. In the Language Name field, select the appropriate language from the Language Name dialog box, and then click OK.
9. Verify that the Active field is checked.

NOTE: For more information on using the list of values for a global deployment, see *Global Deployment Guide*.

To create a new establishment

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. In the List of Values list, click the menu button, and then choose New Query.
3. In the Type field, select EXP_ITEM_ESTAB from the drop-down list, and then run the query.

   Existing expense types appear.
4. In the List of Values list, add a record.
5. In the List of Values form, choose EXP_ITEM_ESTAB in the Type field.
6. In the Display Value and Language Independent Code field, enter the name of the new expense type.
7. In the Translate field, select the check box.
8. In the Language Name field, click the select button, choose the language from the Language Name dialog box, and then click OK.

   NOTE: Establishments must have an parent of the type EXP_ITEM_TYPE.

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9. Choose the appropriate Parent Language Independent Code.

   NOTE: For more information on using the list of values for a global deployment, see *Global Deployment Guide*.

To add establishments to the List of Values Explorer view

1. From the application-level menu, choose View > Site Map > Application Administration > LOV Explorer.
2. In the List of Values-Type list, click Query.
3. In the List of Values-Type form, enter EXP_ITEM_TYPE in the Type field and click Go.

   Existing expense types appear, both in the list and the explorer.

4. In the Explorer view, click the plus sign (+) to expand the expense type you want.

5. Drill down on the Expense Item Type.

6. Click the plus sign (+) next to the Child List of Values folder.

   All establishments for that expense type are listed.

7. In the Child List of Values list, add a new record.

8. In the Child List of Values form, select EXP_ITEM_ESTAB in the Type field.

9. In the Name field, click the select button, and choose the establishment to add.

For more information on configuring the list of values, see *Siebel Tools Reference*.

NOTE: To use the new expense type created on the list of values, you must map it to a report. For more information about mapping expense types to reports, please see "Mapping Expense Types for Reports" on page 275.

Mapping Expense Types for Reports

As an administrator, you modify expense types using the Application Administration screen, Expense Types view. Expense types show the ways that the expenses are rolled up in the expense report. For example, Airfare rolls up to the Air/Rail column in the Expense Report. It then rolls up to the Travel category in the Expense Summary Report.

You also determine the Expense Report and the Summary category to be associated with the Expense Type. You can modify the way expenses are rolled up and which expenses are rolled up into which categories.

NOTE: To make further changes or additions to expense reports, including modifying the layout, you must use Actuate and Siebel Tools.

To specify expense type reports and summary categories

1. From the application-level menu, choose View > Site Map > Application Administration > Expense Types.
2. In the Expense Type list, click the menu button, and then choose New Record.
3. In the Expense Types form, select an Expense Type from the Expense Type drop-down list.
4. In the Report Category field, select a Report Category from the drop-down list.

   This determines the Expense Report category this type rolls up to.

   NOTE: The report categories are created in the List of Values, with a type of EXP_ITEM_CAT. You can create more report categories in the List of Values. If you create a new report category, however, you must use Actuate and Siebel Tools to include it in an Expense Report report.

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5 In the Summary field, select a Summary from the drop-down list.

This determines the Expense Summary Report category this type rolls up to.

NOTE: The summary categories are created in the List of Values, with a type of EXP_ITEM_SUMCAT. You can create more summary categories in the List of Values. If you create a new summary category, however, you must use Actuate and Siebel Tools to include it in an Expense Report report.

You can modify or delete any existing expense type category specifications from this view.

Expense Reports and the Euro

An expense report is automatically assumed to be reimbursed in the default currency, which is the currency of the user's country. However, a user may need to be reimbursed in a different currency, or may have expense report line items in different currencies.

Table 16 shows examples of how different rules apply to the exchange rate that appears automatically for expense reports, and whether or not the rules allow you to change the exchange rate. These rules depend on whether or not the currency being exchanged is a member of the European Monetary Union (EMU).

Table 16. Exchange Rate Behavior for Expense Reports

Incurred Currency	Reimbursement Currency	Exchange Rate Provided?	Exchange Rate Changeable?	Comments
EMU	EMU	Yes	No	The currencies have a fixed exchange rate through the Euro, and use a conversion process called triangulation.
Not EMU	EMU	Yes	Yes	You provide the exchange rate.
EMU	Not EMU	Yes	Yes	You provide the exchange rate.
Not EMU	Not EMU	Yes	Yes	You provide the exchange rate.
Any currency	Same as incurred currency	Yes; the exchange rate is 1	No	Because the two currencies are the same, you cannot change the exchange rate.

Using a Different Expense Period Type

When creating an expense report, you select the period the expense report covers. The Pick Period dialog box shows only periods of the type Week. If you have not defined any periods with this type, then the periods do not appear in the Pick Period dialog box.

Do not use the Period Type Weekly if this does not suit your implementation.

The Period Type of Week is specified in three places in the repository:

1. Search-Spec of applet 'Period Pick Applet-Open': [Closed Flag] = 'N' and [Period Type] = LookupValue("PERIOD_TYPE", "Week")
2. Field [Period Type Default] of 'Time Sheet' BusComp: LookupValue("PERIOD_TYPE", "Week")
3. Field [Period Type Default] of 'Expense Report' BusComp: LookupValue("PERIOD_TYPE", "Week")

If you need a Period Type other than Week, then the previous three items must be modified in Siebel Tools to indicate the new Period Type. You can allow users to pick from multiple types of periods if the search specification is similar to ‘Type-1 OR Type-2’. For more information on using Siebel Tools, see *Siebel Tools Reference*.

You can use only one Period Type with auto-generation of expense reporting. These expense reports use the second and third items in the preceding list to find a period when creating a new expense report or time sheet for a single period type.

Setting User Approval Limits for Time and Expense

Based on the reporting structure of your organization, you will need to set up the proper expense report limits and hours limits for the expense reports and time sheets approval process.

To set expense report approval limits

1. From the application-level menu, choose View > Site Map > User Administration > Employees.
2. In the Employees list, select the employee associated with the approval limit.
3. In the More Info form, click the show more button to expand the form.
4. In the Expense Approval Limit field, enter the approval limit.

To set time sheet hours approval limits

1. From the application-level menu, choose View > Site Map > User Administration > Employees.
2. In the Employees list, select the employee associated with the approval limit.
3. In the More Info form, click the show more button to expand the form.
4. In the Time Sheet Hours Approval Limit field, enter the hours limit.

Creating Time Sheet Work Types

Work Types are used in time sheets as a way to analyze how your time is spent when it is not being reported against a specific project. Examples of work types are vacation time, travel time, or sick days.

To create work types

1. From the application-level menu, choose View > Site Map > Application Administration > Work Types.
2. In the Work Types list, click the menu button, and then choose New Record.
3. In the Work Types list, complete the following fields:
   - Name (example: vacation)
   - Start (the date you want the work type to be active)
   - End (the date you want the work type to be inactive)

NOTE: Users must be set up in the access list field to be able to access the work type in their time sheet.

Configuring Siebel ERM 15

This section describes configuration tasks that are necessary to use some Siebel ERM modules. Configuration tasks include procedures for:

- Establishing the GUESTERM User
- Modifying ERM Predefined Queries
- Establishing D&B user credentials to allow access to D&B's detailed business and credit reports
- Activating ERM layout controls for end users.

For information about installing Siebel applications or general Siebel parameters, see *Siebel Server Installation Guide for Microsoft Windows*, *Siebel Server Installation Guide for UNIX*, and *Siebel Web Client Administration Guide*.

For general information about configuring Siebel applications, see *Siebel eSales Administration Guide*.

Configuring Siebel ERM for GUESTRM User

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

To set up the GUESTERM user

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

   Login = GUESTERM

   Password = DBPASSWORD

   (DBPASSWORD represents a password that you provide)

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

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

   ---

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

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

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

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

```
[/ERM]
AnonUserName  = sadmin
AnonPassword  = password
ConnectString = ...
StartCommand  = SWECmd=GotoView&SWEView=Portal+Page+Home+View
```

5 Enter the following values.

```
AnonUserName  = GUESTERM
AnonPassword  = DBPASSWORD
```

6 Save the `eapps.cfg` file.

Restart the Web server.

Modifying Siebel ERM Predefined Queries

A *predefined query (PDQ)* is a query with specific criteria already defined. Typically, the criteria includes information on which records to search for and in what order the records should appear. The conditional expression within a query that determines the set of retrieved records is called a *search specification*. The *sort specification* is the conditional expression within the query that determines the order of the retrieved records.

Predefined queries are set up by the system administrator and cannot be deleted or modified by end users. Siebel ERM is preconfigured with several PDQs, and some of these predefined queries are used in sections on the home page.

There is one predefined query for each of the main business objects in Siebel ERM. Other pages in Siebel ERM also use predefined queries. You can modify the PDQs to change the default search or sort specifications. Table 17 shows the PDQs that are included with Siebel ERM and the associated ERM page and business object for each PDQ.

See *Siebel Tools Reference* for more information about search and sort specifications.

Table 17. Siebel ERM Predefined Queries

PDQ Name	Page	Business Object
Account	Account Briefing	ePortal Account
All Approvals	Compensation Plan Users	ERM CompPlan Approval
All Plans	My Compensation Plans	ERM CompPlan Workbook
Approvals Delegated to Me	Compensation Plan Users	ERM CompPlan Approval
Competitor	Competitor Briefing	ePortal Competitor
Corporate Marketing	Corporate Marketing	ePortal Cat Corporate Marketing
Employee Self-Service Forms	SmartScript Administration	SmartScripts
ERM Corporate Objectives	Corporate Objectives	ERM Corporate Objectives
HR	HR	ePortal Cat HR

Table 17. Siebel ERM Predefined Queries

PDQ Name	Page	Business Object
Industries	Industries	ePortal Cat Industries
IT	IT	ePortal Cat IT
My Approvals	Compensation Plan Users	ERM CompPlan Approval
My Briefings	Home Page	ePortal Employee
My Plans	My Compensation Plans	ERM CompPlan Workbook
Partners	Partners	ePortal Cat Partners
Plans Delegated to Me	My Compensation Plans	ERM CompPlan Workbook
Products	Products	ePortal Cat Products
Project Home Page Query	Project Home Page	Project
Sales	Sales	ePortal Cat Sales
Training	Training	ePortal Cat Training

You can modify PDQs using the Predefined Queries view.

To modify a predefined query

1 From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.

2 In the Predefined Queries list, query to locate the PDQ record.

3 Click the menu button and then choose Copy Record to create a backup copy of the predefined query.

4 Complete the fields for the PDQ record.

NOTE: Modifying a PDQ in the Predefined Queries view changes the query for all users.

For more information about creating and modifying PDQs, see *Applications Administration Guide*.

Establishing D&B User Credentials for ERM

In addition to D&B Company Profiles that appear on Account, Competitor, and Company Briefings, Siebel Systems and D&B offer a cobranded Web site that allows Siebel customers to access D&B's detailed business and credit reports through their Siebel application. These reports include Business Background Reports, Financial Profiles, Payment Analysis Reports, and Supplier Evaluations.

You have two options for providing users with access to D&B business and credit reports:

- **Credit card access.** This default option requires the user to enter credit card information for payment.
- **Contract access.** Contract Access requires customers to sign a contract with D&B. Customers are then given logon credentials to use each time they want to order D&B reports, and the price of the report is billed against the contract.

If your company has a contract with D&B to purchase these reports, you can configure your Siebel ERM application to allow users contract access to the D&B company report site. This allows your employees to click a D&B link in the Additional Information section of Briefing documents and enter the D&B Report site with contract access.

To activate the D&B link, you enter your company's D&B account name and password in the Host Administration list in the Administration view.

To allow contract access to the D&B report Web site

1. From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.
2. In the Symbolic URL list, select the AccountAdditionalInfo content agent.

3 In the Symbolic URL Arguments list, create URL arguments for the selected content agent.

The following tables shows argument names, such as DNBLink, and each argument's associated value.

Argument Name	Argument Value
DNBLink	Enter the name of the contract.
DNBPassword	Enter the password from the logon credentials issued by D&B.
DNBUser	Enter the user name from the logon credentials issued by D&B.

4 In the Symbolic URL list, select the CompanyAdditionalInfo content agent.

Repeat Step 3 and Step 4.

When users click the D&B link that appears in Account, Competitor, or Company Briefings, they enter the D&B Company Report site with contract access.

For more information about D&B reports and services, see *Applications Administration Guide*.

Setting Up Layout Controls for ERM

To activate user layout control, Siebel ERM includes a SWE tag <swe:layout> and supporting configuration file settings and applet control objects in Siebel Tools.

NOTE: Siebel Web Template Files (.swt) are located in the `webtempl` directory of your Siebel Server installation directory.

The swe:layout Tag

The end user can reorder and hide applets. The swe:layout tag is used to conditionally determine the HTML content that appears based on the current view's layout mode and the user's layout preferences.

Usage

```
<swe:layout viewDisplayMode="xxx" appletDisplayMode="xxx"
appletDisplaySize="xxx" />
```

Attributes

`viewDisplayMode:` This is optional. It can have values Layout or Show. If `viewDisplayMode` is Layout, the tag is only shown if the user is in Edit View Layout mode. If `viewDisplayMode` is Show, the tag is only shown if the user is *not* in Edit View Layout mode. If `viewDisplayMode` is not specified, the tag is shown whether or not the user is in Edit View Layout mode.

`appletDisplayMode:` This is optional. It can have the value Show or Hide. If `appletDisplayMode` is Show, the tag is shown only if the applet is visible. If `appletDisplayMode` is Hide, the tag is shown only if the applet is hidden. If `appletDisplayMode` is not specified, the tag is shown regardless of applet visibility.

`appletDisplaySize:` This is optional. It can have the value of Min or Max. If `appletDisplaySize` is Min, the tag is shown only if the applet is minimized. If `appletDisplaySize` is Max, the tag is shown only if the applet is maximized. If `appletDisplaySize` is not specified, the tag is shown regardless of applet display size.

Restrictions

Restrictions can only be used only within Applet Web Templates. At least one of the attributes *must* be specified.

Examples

The following examples show sample SWE tags and describes how the HTML content appears.

```
<swe:layout appletDisplayMode="Show">
```

This text is shown only when the applet is visible, whether or not the user is in Edit View Layout mode.

```
</swe:layout>
```

```
<swe:layout viewDisplayMode="Show">
```

This text is shown only when the user is *not* in Edit View Layout mode.

```
<swe:layout appletDisplayMode="Show" appletDisplaySize="Max">
```

This text is shown only when the user is not in Edit View Layout mode and the applet is visible and the applet is maximized.

```
</swe:layout>
```

```
<swe:layout appletDisplayMode="Hide">
```

This text is shown only when the user is *not* in Edit View Layout mode and the applet is hidden.

```
</swe:layout>
```

```
</swe:layout> <!-- viewDisplayMode="Show" -->
```

Applet Controls

Each applet that will be moved or hidden has controls that render the appropriate image (for example, Move Down image) and call the appropriate InvokeMethod (for example, MoveAppletDown). The controls include:

- ButtonHideApplet
- ButtonMaximizeApplet
- ButtonMinimizeApplet
- ButtonMoveAppletDown

- ButtonMoveAppletUp
- ButtonShowApplet

There are also general layout controls that allow the user to perform certain operations (through InvokeMethods). These controls include edit the view layout, show the view layout, reset the default layout, show all applets, hide all applets, minimize all applets, maximize all applets. These layout controls are typically added to the first applet in a view. General layout controls include:

- ButtonEditViewLayout
- ButtonShowViewLayout
- ButtonResetViewLayout
- ButtonHideAllApplets
- ButtonShowAllApplets
- ButtonMinimizeAllApplets
- ButtonMaximizeAllApplets

For more information about modifying SWE templates, see *Siebel Tools Reference*.

Setting Up an Application Services Interface 16

Siebel ERM includes an Application Services Interface (ASI) that help an organization to integrate and synchronize employee and position data between Siebel ERM and the following HRMS applications:

- PeopleSoft HR 8.0, 7.5, or 7.0
- SAP HR
- Oracle HR

Both Siebel ERM and the third-party HRMS can store data that is fundamentally the same; however, each system maintains a separate database.

This chapter describes how to set up an Application Services Interface (ASI), and synchronize the data.

Example Process Flow for ERM ASI Setup

The following section describes the process an administrator might follow to set up a third-party Human Resources Management System for use with Siebel ERM Applications Services Interface.(ASI). Your company may follow a different process according to its business requirements.

Administrator Procedures

When setting up ASI, you should perform the following procedures in the order presented:

Perform the procedures in the following order:

- **Configure Web Services.** The administrator configures Web services for each employee. For more information, see "Configuring Web Services" on page 293.
- **Activate the workflows.** The administrator verifies that the Synchronize Employee ASI workflow is active. For more information, see "Activating the Employee ASI Workflow" on page 295.
- **Synchronize data.** The administrator synchronizes ERM and third-party HRM employee data. For more information, see "Synchronizing ERM and Third-Party Employee Data" on page 296.

Configuring Web Services

Web services are used to direct the inbound and outbound messages to and from the third-party HRMS. Verify that the Web service is correctly configured for each employee.

To configure the Web services for an employee

1. From the application-level menu, choose View > Site Map > Web Services Administration > Outbound Web Services.
2. In the Outbound Web Services list, query to find the External Employee Web service.
3. Verify that the fields in the Outbound Web Services list match the information in the following table.

Namespace	Name	Status
http://siebel.com/asi/	External Position	Active

4. In the Service Ports list, add a new record, and then complete the fields.

   The following table describes the fields in the service port record.

Field	Comments
Address	When you select a transport, the field is populated with a template address. For example, the root of the address can be different depending on your environment.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC.
Name	Enter a descriptive name for the port.
Port Type	Enter External Employee.
Transport	Select File from the drop-down list.

For more information about configuring Web Services and setting up demonstration scripts, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.

Activating the Employee ASI Workflow

The Synchronize Employee ASI workflow must be active for synchronization to occur.

To activate the workflow for an employee

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Workflow Processes list, query to find the Synchronize Employee ASI workflow.
3. In the Status field, verify that the workflow is Active. If the status is Inactive, change the status to Active.

NOTE: After you have activated the workflow for employee data, restart your server.

Synchronizing ERM and Third-Party Employee Data

After ASI setup is completed, you can synchronize ERM and third-party HRM employee data.

To synchronize employee data with a third-party application

1. From the application-level menu, choose View > Site Map > Employee Administration > Employees.
2. In the Employee list, query to find the record you want to update.

   You can edit the record before you synchronize. The changes you make are updated in both systems after synchronization.
3. Click the menu button and then select Synchronize.

   TIP: Choose Synchronize All if you have made changes to several records. Synchronize All synchronizes the changes on multiple records at one time.

Support and Troubleshooting 17

This chapter helps you troubleshoot common problems related to Siebel ERM.

ERM Troubleshooting Topics

The following troubleshooting topics are addressed in this section:

- External News and Data Do Not Appear on page 299
- News Does Not Appear in the Our Company Section on page 301
- Not Found Error in the Siebel Mobile Web Client on page 302
- Users Receive Too Much News on page 302
- Literature and Bulletins Are Out of Date on page 303

External News and Data Do Not Appear

Your company has purchased Siebel eContent Services and you are able to access the Web from your workstation, but you do not receive external news and data on the ERM home page. In this example, the problem may be that a proxy server is being used to insulate your network from the Internet and is not allowing the Siebel application to pass requests through and return data to the application.

Verify Connectivity with Siebel eContent Services Data Host

Verify connectivity with the Siebel eContent Services data host using network utilities, such as ping, nslookup, and tracert.

If you do not know the name of the Siebel eContent Services data host, you can find it in the license key letter that Siebel Systems sent to your company.

Verify Your Web Connection and User Credentials

Verify that you have a valid Web connection and that your Siebel eContent Services credentials are valid.

To verify your Web connection and credentials

1. Open a Web browser on your Siebel server.
2. Enter one of the following URLs:
   - for eContent customers:

     ```
     http://{eContent_hostname}/eContent/
     GetCompanyNames?FIND=Siebel
     ```

   Change {eContent_hostname} to the name of your content host.

   - for ContentBroker customers:

     ```
     http://{ContentBroker_hostname}/eContent/
     GetCompanyMID?FIND=Siebel
     ```

   Change {ContentBroker_hostname} to the name of your content host.

   A dialog box appears prompting you for your Siebel eContent Services user credentials. You can find your user credentials in the license key letter that Siebel Systems sent to your company.

3 Enter your user credentials.

Company information about Siebel should appear. If it does, your user credentials are valid. Skip the next step.

If you receive an “Access Denied” message or other type of message, the proxy server may not be allowing access to the Internet.

4 If you have received an error message, try to access the URL using a browser on a machine that does not go through the proxy server or firewall and repeat Step 1 through Step 3.

If company information about Siebel Systems appears, then the problem lies with the Siebel server passing through the proxy server to retrieve data through the Internet. Contact your network administrators to resolve the issue.

Verify Server Configuration

If you could access the Siebel company information using the previous procedure, then the problem may be in the configuration settings for the proxy server or in the Siebel ERM server configuration files.

To test your configuration settings

1 Start the twsiebel client in your browser.

2 Open a second browser window at the same time and enter the following URL:

```
http://localhost/start.swe?SWECmd=
GotoView&SWEView=SI+Com+Company+Briefing+View&MID=808856512
```

NOTE: URLs are case-sensitive.

3 Enter valid login credentials, and then click Login.

If external content does not appear, this indicates a configuration problem, either with the proxy server or within the server configuration file.

If the problem is not resolved after checking your configuration settings, follow the instructions in the next section, and then contact Siebel Technical Support to resolve the issue.

Gather Information for Siebel Technical Support

If you have completed the steps previously described and cannot resolve the issue, contact Siebel Technical Support. To assist Siebel Technical Support in diagnosing the issue, please gather the following information.

If you are using Windows NT Server, use the following procedure to extract proxy server registry settings.

To copy registry settings

1. Choose Start > Run.
2. Open the Registry Editor by typing “regedit” in the Open field.
3. Navigate to the following directory:

   ```
   HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\
   Internet Settings
   ```

4. Copy the contents of the following two keys into a text file:

   `ProxyServer`

   `ProxyOverride`

5. Save the text file to send to Siebel Technical Support.
6. Navigate to the following directory:

   ```
   HKEY_USERS\.DEFAULT\Software\Microsoft\Windows\CurrentVersion\In
   ternet Settings
   ```

7. Copy the contents of the following two keys into a text file:

   `ProxyServer`

   `ProxyOverride`

8. Save the file to send to Siebel Technical Support.

News Does Not Appear in the Our Company Section

If news does not appear in the Our Company In The News section of the ERM home page, but it does appear in other news sections, it is likely that you did not assign an account topic to the special “_Our Company_” record.

For more information, see “Retrieving Account and Competitor News for Briefings” on page 173.

Not Found Error in the Siebel Mobile Web Client

If users receive a “404 Not Found” error after clicking Company Lookup in the Account Topic Manager, then the constructed external URL went to a valid host name but specified a URL path that does not exist. This usually indicates that a Symbolic URL is not correctly defined.

For more information on ways to resolve this problem, see Chapter 9, “Setting Up eContent Services.”

Users Receive Too Much News

If the amount of news and data that is published on a regular basis in Siebel ERM becomes too large, you can change the number of days that news and data are published by changing the argument values in the Integration Administration > Symbolic URL view. This will decrease the amount of information by removing older items.

The number of days for which articles are published is controlled by the HIST argument value in content agents. Table 18 provides an example of the Symbolic URL HIST argument values.

Table 18. Symbolic URL HIST Argument

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/eContent/GetHeadlines	HIST	N	1	Constant	90

The default setting for HIST is 90 days.

You can also change the number of articles that appear. The number of articles that appear is controlled by the MAX argument value in content agents. Table 19 provides an example of the Symbolic URL MAX argument values.

Table 19. Symbolic URL MAX Argument

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/eContent/GetHeadlines	MAX	N	1	Constant	20

The default setting for MAX is 20 days.

If users are receiving news and information about too many accounts or competitors, they can reduce their list of tracked accounts and competitors by modifying their tracking profile.

Literature and Bulletins Are Out of Date

If a literature item or bulletin is no longer useful or it is replaced by a more recent version and the original item has not yet reached its expiration date, you can change the item's expiration date to the current date. This removes the item from the ERM home page.

Employee Self-Service Reference A

This appendix includes information and sample scripts used to administer Employee Self-Service.

Example eScript for Requestor Form

The following script is used to link an employee self-service business process to the unified approvals inbox. In this example, the script is linked to the approval type called PAFChange.

```
function Script_Finish ()

{

   var szScriptSessionId;

   var szRequester;

   var svc;

   var indata;

   var outdata;

// Cancel saving everything to the database

   Cancel ();

indata =TheApplication ().NewPropertySet ();

   outdata = TheApplication ().NewPropertySet ();

// Get the login name of the user

   szRequester = TheApplication ().LoginName ();

   // Get SmartScript Save Session table Id.

   szScriptSessionId = GetSessionId ();

// ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
```

```
   // required input arguments for the "Universal Inbox.Initialize"
   indata.SetProperty ("ItemObjectId", szScriptSessionId);
   // Item Type is the Approvals Inbox type defined in the
   // Approvals Inbox Administration screen
   indata.SetProperty ("ItemType", "PAFChange");
   // Short Description of the inbox item
   indata.SetProperty ("ItemDescription", szScriptSessionId);
   indata.SetProperty ("ItemSubmittedBy", szRequester);
// ItemQueueDuration, ItemPriority, and ItemComments are the
   // optional input arguments for the "Universal Inbox.Initialize"
   indata.SetProperty ("ItemQueueDuration", "129600");
   indata.SetProperty ("ItemPriority", "High");
   indata.SetProperty ("ItemComments", "Comments from Employee Self-Service");
   svc = TheApplication ().GetService ("Universal Inbox");
   svc.InvokeMethod("Initialize", indata, outdata);
}
```

Example eScript for Summary Form

The following script is used by summary forms.

```
function Script_Open ()
{
   var PageFirstPage;
   var QuestLastName;
   var szLastName = "";
   var szScriptSessionId = "";
   var boCallScripts;
   var 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");
   bcCSRunAnswer = boCallScripts.GetBusComp("Call Script Run Answers");
// Query for the employee's last name
   with (bcCSRunAnswer)
   {
      SetViewMode (AllView);
      ClearToQuery ();
      ActivateField ("Run Id");
      ActivateField ("Page Name");
      ActivateField ("Question Name" );
```

```
            ActivateField ("Answer Text" );
            SetSearchSpec ("Run Id", szScriptSessionId);
            SetSearchSpec ("Page Name", "PAF Which Change");
            SetSearchSpec ("Question Name", "Display Employee Last Name");
            ExecuteQuery (ForwardOnly);
            if (FirstRecord () != 0)
               szLastName = GetFieldValue ("Answer Text");
         }
      bcCSRunAnswer = null;
         boCallScripts = null;
      // Set the values of each question by the scripting
         QuestLastName.SetCurrentValue (szLastName);
         return;
      }
```

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