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Automating SR Summarization and KM Article Generation

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Summary

As organizations strive to improve service efficiency and knowledge management, providing a seamless way to summarize service request (SR) activities becomes vital. When a Service Representative closes an SR and there is a need to create a new Knowledge Management (KM) document, generating an accurate and concise summary of the SR activities can significantly streamline the process. In Siebel CRM, this capability can be enhanced by leveraging GenAI to automatically generate apt summaries, which can then be used as attachments or message bodies with the "New Knowledge Doc Create" functionality in Fusion KM. This integration not only showcases the innovative use of Gen AI in Siebel but also highlights productivity improvements for the KM process by automating content generation and ensuring consistent, high-quality documentation.

Overview

In industries utilizing Siebel CRM to manage service requests (SRs), documenting key insights from resolved SRs into Knowledge Management (KM) systems can be time-consuming and prone to inconsistencies. When organizations require new KM articles based on SR activities, manual efforts often hinder productivity. Introducing an automated system for SR summarization and KM article creation can greatly enhance efficiency and accuracy. For example, when a Service Representative closes an SR, the system uses the OCI AI framework to generate a concise summary of the SR's key activities. This summary forms the content for a new KM article. The process is streamlined further through Fusion KM REST APIs, which enable seamless publication of the article in the KM system without requiring additional manual intervention.

A practical use case is seen in customer support. When a customer's issue is resolved, the system analyzes the SR details, produces a high-quality summary, and publishes it as a KM article. This document becomes an accessible resource for addressing similar issues in the future, reducing redundancy in operations.
By automating the summarization and publishing workflow, this integration enhances productivity, ensures consistency in KM documentation, and improves the overall service delivery experience.

Challenge: Automating Service Request Summarization and KM Article Creation

Manually summarizing service requests (SRs) and creating Knowledge Management (KM) articles is a time-consuming and error-prone process. Service Representatives must extract key details from SR activities, which often delays article creation and impacts productivity. Automating this workflow with AI-driven summarization and seamless integration with Fusion KM for article publishing addresses these challenges, ensuring efficiency, accuracy, and consistent knowledge documentation.

How it works

The SR summarization workflow begins when the sales admin clicks the new Generate button, invoking the SR Summarization Business Service. The GetSRSummary method uses the SRNumber as input to fetch SR and activity details, leveraging the Siebel OCI AI Framework - Gen AI to create a concise summary. A button is provided for users to edit this generated summary. Once edits are complete, the user clicks Apply to proceed with the KM article creation. When the Apply button is clicked, the method is triggered, invoking the Knowledge Management Article creation API. The input details such as Title, Summary, Question, and Answer are sent to the API. If the creation is successful, a success status is returned, and the popup is closed. In case of an error, the error message is displayed within the popup for user feedback.

Benefits

1. **Improved Efficiency**: Automating the SR summarization process reduces manual effort and speeds up the creation of Knowledge Management articles.

2. **Consistency in Documentation**: The use of AI ensures that SR summaries are consistently formatted and high-quality, reducing human error.

3. **Real-Time Access to updated Knowledge Base**: Automatically generated articles ensure that new knowledge articles are available in KM instantly, enhancing support and decision-making.

4. **Seamless Integration**: The system integrates well with Siebel CRM and Fusion KM, streamlining the workflow from SR closure to article publication.

5. **Enhanced User Experience**: Users can edit the generated summary, giving them control over the final content while maintaining efficiency.

Conclusion

Automating SR summarization and KM article creation improves productivity, reduces errors, and ensures timely access to accurate information. By integrating Siebel OCI AI Framework for Gen AI and Fusion KM APIs, this solution streamlines processes, enhancing both operational efficiency and the user experience.

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