# HelpDesk Guide

Siebel CRM

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ORACLE

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# Contents

## Chapter 5: Setting Up Employee Self-Service



## Index

# 1 What's New in This Release

## What's New in Siebel HelpDesk Guide, Siebel CRM 21.1 Update

Table 1. What's New in Siebel HelpDesk Guide, Siebel CRM 21.1 Update

| Topic | Description |
|---|---|
| Throughout | Removed content no longer applicable to Siebel CRM. |

# 2 Getting Started

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

- *Siebel Applications Administration Guide* covers setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information that you need to perform data administration and document administration tasks.
- *Siebel System 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 2 lists and describes the administrative setup tasks that are specific to Siebel HelpDesk. The table also directs you to documentation about each task.

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

Table 2. Administrative Setup Tasks

| Administrative Task | Description | For More Information |
|---|---|---|
| Install servers and applications, and then enter license keys for specific Siebel applications. | Install Siebel Gateway Name Server, Siebel Server, Siebel Database Server, and Siebel Web Servers. Specify Content Services. | Refer to the *Siebel Installation Guide* for the operating system you are using |
| Set up Responsibilities for delegated administrators and users. | Assign users and views to preconfigured responsibilities; create new responsibilities. | *Siebel Applications Administration Guide*<br>Setting Up Siebel HelpDesk Responsibilities on page 12 |

Table 2. Administrative Setup Tasks

| Administrative Task | Description | For More Information |
|---|---|---|
| Set up Siebel Knowledge Base and HelpDesk Solutions Database | Set up Siebel Knowledge Base and working with HelpDesk Solutions Database. | *Siebel SmartScript Administration Guide*<br>Setting Up Siebel Knowledge Base for HelpDesk on page 13<br>Working with the HelpDesk Solutions Database on page 14 |
| Activate HelpDesk Business Processes | Verify that HelpDesk-specific workflow processes are active, and create new processes if desired. | *Siebel Business Process Framework: Workflow Guide* |

# 3 Setting Up HelpDesk

Siebel HelpDesk allows employees to submit and track service requests through the organization's intranet and solve problems without assistance by providing access to frequently asked questions and solutions in a Knowledge database. Employees can also use employee self-service features such as Assets Online to get help and information.

This chapter describes setting up and using Siebel HelpDesk features and resources that administrators can use to set up other features. It includes the following topics:



## Siebel HelpDesk and Support Organizations

Siebel HelpDesk is a suite of support solutions which allows organizations to manage service for their internal support organizations. The Siebel HelpDesk module is designed to reduce the support agent's workload while increasing first-contact problem resolution rates. Siebel Automated Solutions allows employees to fix applications, run automated diagnostics scripts on their computers to remotely analyze other employees' computers, chat electronically with other employees, and audit the network for hardware and software inventories.

By using Siebel HelpDesk:

- Organizations can create new help desks to capture information for each internal service situation. Each help desk can include its own subareas and routing rules, and administrators can configure rules for each subarea. This capability allows the organization to provide a single, consistent interface to the support function across departments.
- You can leverage tools for asset inventory, digital ID inventory, auto-assignment and other support automation features to reduce the need for intervention by support specialists.
- Problems can be tracked and measured against a single service-level agreement (SLA). This capability allows each employee to receive a consistent level of service, because issues are recognized and escalated to facilitate a resolution.
- Organizations can create and maintain a single repository of information so that employees can access the most current answers to questions.

# Siebel HelpDesk Administrator Resources

The following resources can assist the administrator responsible for setting up and configuring Siebel HelpDesk.

## Siebel HelpDesk Entitlements

Siebel HelpDesk provides service entitlement verification of registered users in addition to the standard contact authentication at login. If entitlement verification is active when a user tries to create, update, or view a service request, the application verifies that the user is listed as a contact for a currently valid service entitlement. For more information on setting up service-level agreements, see *Siebel Field Service Guide*.

## Asset Management and Allocation

Administrators can assign assets (such as laptops and security tokens) to each employee, add products and make them available as assets, and track and store asset information. For more information, see *Siebel Field Service Guide*.

## Siebel HelpDesk Employee Surveys

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

Siebel HelpDesk Customer Satisfaction Survey questions and labels can be modified using Siebel Tools. For more information on configuring control properties, see *Configuring Siebel Business Applications*.

An administrator also can modify the list of selectable responses for each survey question. For instructions on modifying lists of values, see *Siebel Applications Administration Guide*.

## HelpDesk Activity Templates

Siebel HelpDesk agents often perform tasks that require multiple steps. As an administrator, you can create activity templates that provide the framework for agents to complete multistep tasks. The templates that you create can provide detailed steps or instructions for common issues. HelpDesk agents can follow the instructions or tasks within an activity template to resolve customer issues. For more information on setting up Activity Templates with associated activities, see *Siebel Applications Administration Guide*.

## Automatic Creation of Attachments

When completing a service request, HelpDesk users can describe each issue in a description field. When the number of characters in the description is greater than the configured number of characters (the default is 2,000 characters) Siebel HelpDesk automatically creates a text file attachment and stores the file to the Siebel file system. The Description field can map to any database column with a character maximum of any specified number, defined by the database table.

To modify this functionality, you use Siebel Tools to configure the Max Description Length user property of the Service Request business component and specify a value for the maximum number of characters for the auto file attachment creation. For detailed instructions on mapping business component fields to database fields other than the default ones, see *Configuring Siebel Business Applications*.

## Email Response

For information on setting up Siebel Email Response, see *Siebel Email Response Administration Guide*.

## Assignment Manager

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

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

## Escalation and Notification

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

To use the escalation and notification engine, see *Siebel Business Process Framework: Workflow Guide*.

## CTI Integration

Siebel CTI (Computer Telephony Integration) provides voice-channel support for call center agents using Siebel Business Applications. CTI capabilities are provided through integration with Oracle's Call Center Anywhere or with third-party CTI middleware packages.

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

# Scenario for Siebel HelpDesk

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

## Administrator

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

The administrator creates a number of solution records, which include answers to frequently asked questions about the organization's 401(k) retirement plan.

To assess the effectiveness of the help desk in resolving problems, the administrator modifies the employee satisfaction survey to pose questions about this area before it is sent to users.

# Process of Setting Up Siebel HelpDesk

This section describes procedures typically performed by administrators when setting up Siebel HelpDesk. Your company may follow a different process according to its business requirements.

## Administrator Procedures

To set up Siebel HelpDesk, perform the following tasks:

1. Setting Up Siebel HelpDesk Responsibilities on page 12
2. Setting Up Siebel Knowledge Base for HelpDesk on page 13
3. Working with the HelpDesk Solutions Database on page 14

# Setting Up Siebel HelpDesk Responsibilities

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

Siebel HelpDesk is preconfigured with several responsibilities that are specific to Siebel HelpDesk. Organizations can use these preconfigured responsibilities to set up help desk users. Table 3 describes the preconfigured help desk responsibilities.

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

The Views and Users subview lists at the end of the screen allow you to specify the users assigned to the selected responsibility and the views that each user can access. You can add or remove views according to your organization's needs, or you can create a new responsibility. For more information on creating and modifying responsibilities, see *Siebel Security Guide*.

This task is a step in Process of Setting Up Siebel HelpDesk on page 12.

Table 3. Preconfigured Siebel HelpDesk Responsibilities

| Responsibility | Users with this responsibility can access... |
|---|---|
| Web Anonymous User | ERM HelpDesk login page. |
| ERM User | HelpDesk online. |
| HelpDesk Agent | Siebel HelpDesk views. |
| Universal Agent | Call Center views. |

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

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

# Setting Up Siebel Knowledge Base for HelpDesk

Siebel HelpDesk provides an integrated, searchable knowledge database of solutions information that HelpDesk agents can develop and use to provide consistent data and answers to customer questions. Using Siebel Service, customers can search a library of categorized solutions and SmartScripts.

For more information, see *Siebel Self Service Administration Guide* and *Siebel SmartScript Administration Guide*.

This task is a step in Process of Setting Up Siebel HelpDesk on page 12.

# Working with the HelpDesk Solutions Database

Solutions are answers to frequently asked questions. Solutions are documented by service agents and call center administrators and are stored in the database. HelpDesk agents document solutions, and agents and customers can frequently resolve service issues by searching this knowledge database. Employees can search the database and retrieve solutions to common problems without having to wait for help desk personnel to become available.

To publish Siebel Solution records, you must first create the solution records and then categorize them using the appropriate Siebel HelpDesk catalogs. After the solutions are categorized, they appear in the appropriate views. To restrict user access to specific categories, you can apply access control to the categorized solutions. After the solution record is created, you must associate the record with the appropriate category:

- For more information creating solutions, see *Siebel Self Service Administration Guide* and *Siebel Field Service Guide*.
- For more information on catalog and category administration, see *Siebel eSales Administration Guide*.

This task is a step in Process of Setting Up Siebel HelpDesk on page 12. It includes a number of related tasks, which are described in this topic.

## Categorizing Solutions

You can use the Catalog Administration view to associate solutions with a category. For example:

- To display solutions in the General FAQs list in Siebel HelpDesk, the solutions must be categorized in the catalog called ERM Catalog.
- To display solutions in the Top FAQs list in Siebel HelpDesk, the solutions must be categorized in the catalog called ERM Top Solutions, and the category must be called ERM Top Solutions.

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

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

   Expand the Category folder to see subcategories.
5. From the Categories list, click the Solutions link, and in the Solutions list, add a new record.

   **NOTE:** If the Solutions link does not appear, click the arrow button to view more links. The arrow button is located next to the last link on the side of the screen.
6. In the Add Solutions dialog box select the solution information you want to add to the category, and then click OK.

   The selected solution is associated with the category.

## Creating a Resolution for HelpDesk Users

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

1. Adding the desired content to the literature catalog. You can specify a path, browse for a file, or link to the file through a URL.

   For more information about literature, see *Siebel Applications Administration Guide*.

2. Create a resolution record, provide a name for the resolution item, and specify the type of the resolution item that has been added.

   For more information, see "To create a resolution for Siebel HelpDesk" on page 15.

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

   For more information about associating existing resolutions with a category, see "Categorizing a HelpDesk Resolution" on page 15.

4. Associate the literature that has been added to the catalog to one or more catalog categories.

   For more information on catalog and category administration, see *Siebel eSales Administration Guide*.

### *To create a resolution for Siebel HelpDesk*

1. Navigate to the Site Map > Administration - Resolution Documents view.
2. In the Resolutions Documents list, add a new record, specify a type, and complete the remaining fields.

## Categorizing a HelpDesk Resolution

You can use the Catalog Administration view to associate existing resolutions with a category.

### *To add a resolution to a category*

1. Navigate to the Site Map > Administration - Catalog > Catalog Administration view.
2. In the Catalogs list, query to find ERM Catalog or ERM Top Solutions.
3. In the catalog record, click the link in the Name field.
4. In the Categories list, select the category with which you want to associate the resolution.
5. Click the Resolution Item tab.
6. In the Resolution Items list, add a record, and complete the necessary fields.

# Setting Up Links on the Service Request Home Page

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

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

1. Navigate to the Administration - Application > View Links view.
2. In the Screen Homepages list, select the Service Requests record.
3. In the View Links form create a new record for each of the four links (All Incidents, All Problems, All Known Errors, and All Requests for Change) by completing the fields described in the following table.

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

# 4 IT Service Management Solution Set

This chapter describes logging, tracking, and solving incident records.

It explains how a problem is identified and how to associate known errors and request for change records to incident and problem records. It also provides information about Asset, Change, and Service Level Agreement Management, and includes the following topics:



For information about setting up and using Siebel HelpDesk features and resources that administrators can use to set up other features, see Chapter 3, “Setting Up HelpDesk.”

## Scenario for IT Service Management Solution Set

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

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

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

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

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

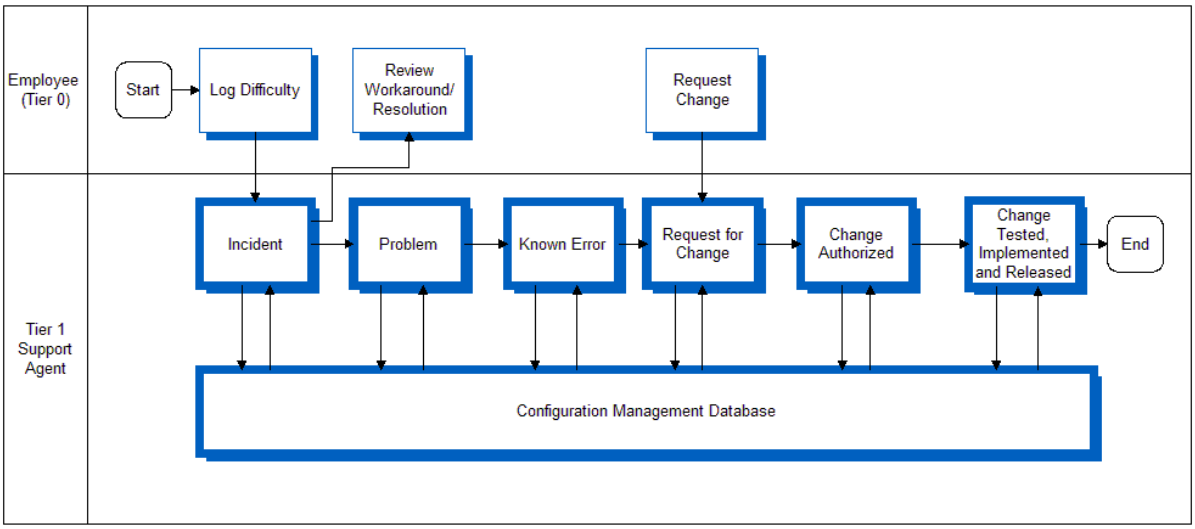


Figure 1. IT Service Management Workflow

# Process for IT Service Management Solution Set

This example process represents some of the tasks a HelpDesk agent typically performs based on the "Scenario for IT Service Management Solution Set" on page 17.

# Incident Management

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

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

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

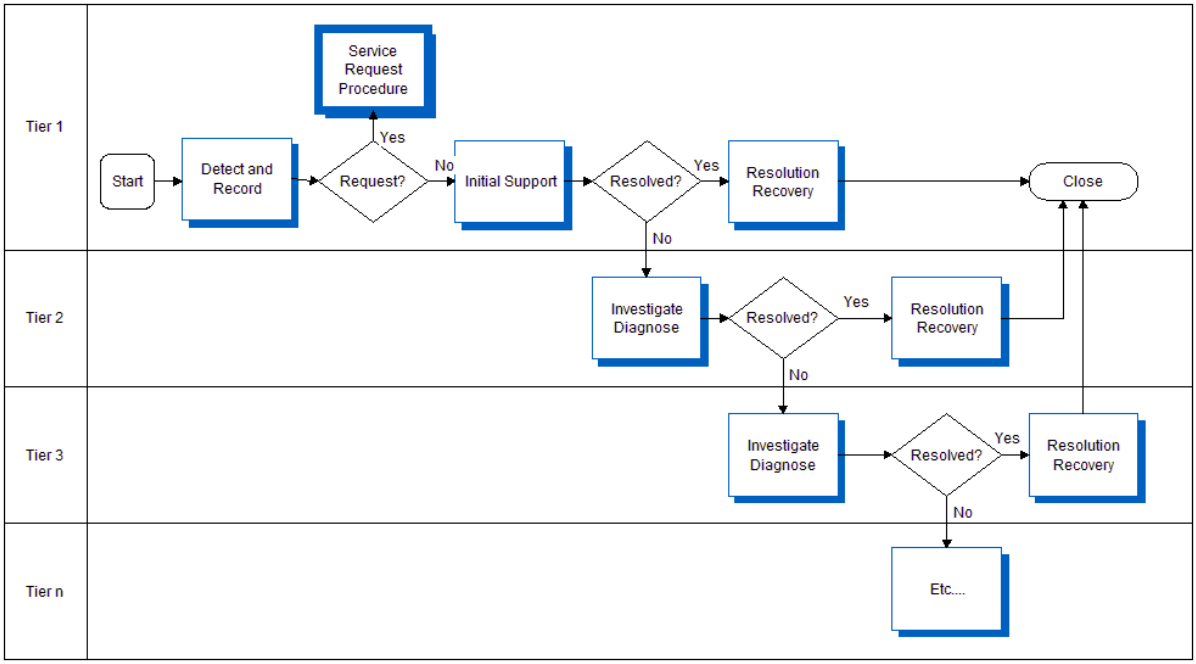


Figure 2. Incident Management Workflow

# Adding Incident Records

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

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

### *To add incident records*

1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.

2 In the Service Requests - HelpDesk list create a new record, and complete the necessary fields.

Some fields are described in the following table.

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

3 Navigate to the Service Requests screen > Service Requests - HelpDesk view.

4 In the Service Requests - HelpDesk list, click the SR # link.

5 In the Owner field, click the select button.

The Pick Service Request Owner dialog box appears.

6 Select the owner, and click OK.

# Investigating and Diagnosing Incident Records

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

### *To identify solutions for incident records*

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

   The Add Solutions dialog box appears.
5. Select the solution you want to add, and click Add.

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

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

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

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

# Resolution and Recovery of Incident Records

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

- Resolves the incident.

  For more information, see the procedure that follows.
- Opens a request for change (RFC) when the incident cannot be resolved.
- Takes recovery actions. A *recovery action* is a permanent solution, a workaround, or temporary fix.
- Notifies the help desk that the incident is resolved.

### *To resolve incident records*

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

# Problem Identification and Management

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

The HelpDesk agent adds a problem record to the database, and then links the associated incident records to the problem record. If solutions and workarounds exist, they are detailed in the problem record.

In the IT Service Management Service Support process, a problem is identified when the following conditions exist:

- Data reveals that incidents are recurring.
- Data shows that incidents are not associated with existing known errors.
- An IT infrastructure analysis shows that a problem could lead to incidents.
- A major incident occurs for which a structural fix is needed.

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

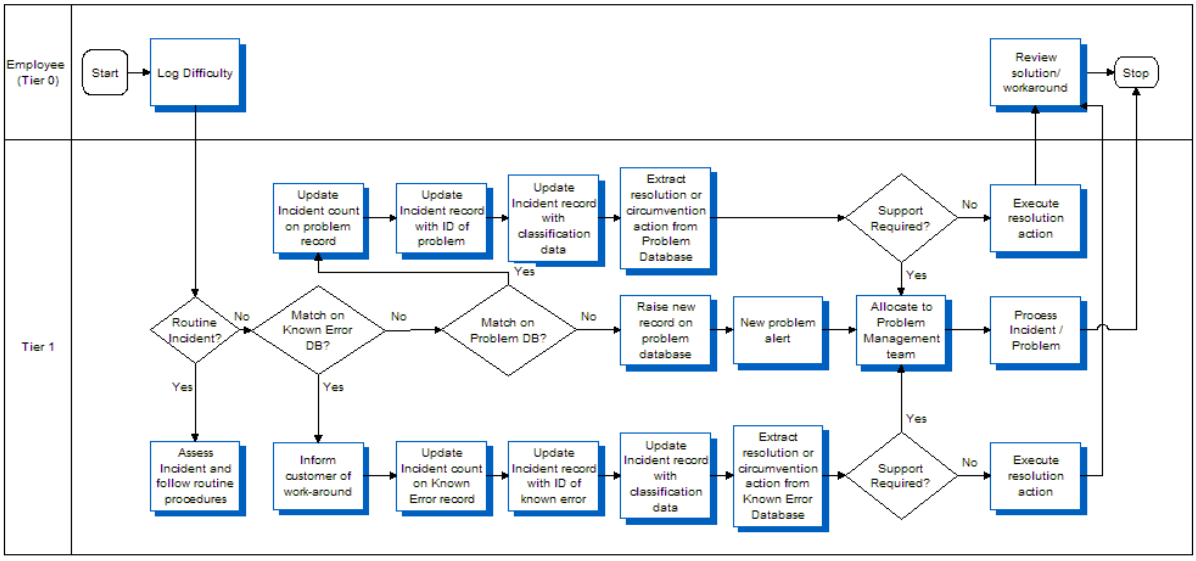


Figure 3. Problem Management Workflow

# Adding Problem Records

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

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

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

### *To add problem records*

1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.

2 In the Service Requests - HelpDesk list create a new record and complete the necessary fields.

Some fields are described in the following table.

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

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

1 Navigate to the Service Requests screen > Service Requests - HelpDesk view.

2 In the Service Requests - HelpDesk list, select the record, and then click the Problem title link.

3 In the HelpDesk Service Request screen, click the Incidents view tab.

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

# Investigating and Diagnosing Problem Records

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

### *To investigate and diagnose problem records*

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

   After a Problem has a Root Cause and Resolution code assigned to it, it should be categorized as a Root Cause. The resolution for a known error can either be through a workaround or through a change management record. A known error record must have either a workaround or a change management record assigned to it before being closed. For more information about known errors, see “Managing Known Errors” on page 25.

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

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

# Managing Known Errors

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

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

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

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

1 An error is identified when a problem is detected.

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

   For more information about identifying errors, see "Adding Known Errors" on page 27.

2 Error assessment.

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

   For more information about error assessment, see "Assessing Errors" on page 27.

3 Error resolution recording.

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

   For more information about error resolution, see "Adding and Closing Error Resolutions" on page 28.

4 Error closure.

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

   For more information, see:

   - "Problem Identification and Management" on page 22
   - "Adding and Closing Error Resolutions" on page 28

5 Problem and Known Error resolution monitoring.

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

   For more information, see:

   - "Problem Identification and Management" on page 22
   - "Adding and Closing Error Resolutions" on page 28

# Adding Known Errors

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

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

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

   Some fields are described in the following table.

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

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

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

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

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

# Assessing Errors

When assessing errors you perform an initial assessment for resolving the error. If necessary, complete a request for change and then link the request for change record to the known error record.

# Adding and Closing Error Resolutions

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

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

### *To record error resolutions*

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

### *To close known error records*

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

### *To associate root causes to records*

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

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

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

# Creating and Releasing Products

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

### *To create a product*

1 Navigate to the Administration - Product view.

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

Some fields are described in the following table.

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

3 In the More Info view tab, make sure the Track as Asset check box is selected.

If your asset has configuration attributes, go to Step 4 and if your product is customizable, go to Step 5 and then to Step 6. When the product information is filled out correctly, you can release the product. For more information, see "To release a product" on page 29.

4 (Optional) If the asset has configuration attributes associated with it, in the Structure Type drop-down list, select Customizable.

5 (Optional) If the product is customizable, click the Customizable Product view tab and then click the Details link.

6 (Optional) In the Details form, click the Product Class select button to select the product class.

### *To release a product*

1 Navigate to the Administration - Product view.

2 Click the Customizable view tab, and then click the Versions link.

3 In the Versions list, select the version record.

4 (Optional) Select the Lock flag check box if you want to update the product.

5 Click the Release New Version button.

# Creating Attribute Classes

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

### *To create a configuration class*

1 Navigate to the Administration - Product Classes view.

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

Some fields are described in the following table.

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

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

Some fields are described in the following table.

| Field | Comments |
|---|---|
| Name | Enter a name for the attribute, for example CPU Speed. |
| Attribute Definition | Select the correct attribute definition, for example Text, Boolean, and so on.<br><br>If you are required to select one value from a list of values, you should create an Attribute Definition and associate it here. For more information about creating attribute definitions, see "Creating Attribute Definitions" on page 30. |
| Default Value (Display) | If your configurations are standard, add a default value. |

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

# Creating Attribute Definitions

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

### *To create an attribute definition*

1 Navigate to the Administration - Product Attribute Definitions view.

2 In the Product Attribute Definitions list, create a new record and complete the necessary fields.

Some fields are described in the following table.

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

3 Click the Attribute Details view tab and add the details (for example Windows 10, and so on) and the sequence you want the attribute definitions to be shown in.

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

You can now associate the attribute definition with a product attribute class and then a product. For more information, see "Creating Attribute Classes" on page 29.

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

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

# Creating an Asset

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

### *To create assets*

1 Navigate to the Assets - HelpDesk view.

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

Some fields are described in the following table.

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

# Associating Backup or Dependent Assets with a Primary Asset

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

### *To add employees to assets*

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

# Viewing Assets in the Database

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

Table 4. Status Values in the HelpDesk Asset

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

# Service Level Management (SLM)

Service Level Agreement Management helps the organization increase employee satisfaction with IT services. When an incident or request for change is logged, the employee provides information that is used to verify entitlement to service. Based on this information, an entitlement is associated with the employee. The entitlement specifies a date and time commitment for closing the service request. For more information on setting up Service Level Agreements, see *Siebel Field Service Guide*.

# Using Service Level Management (SLM)

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

Before you can perform the following task, you must make sure your service level management has been enabled.

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

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

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

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

# Creating Service Level Agreements

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

### *To create SLAs*

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

   Some fields are described in the following table.

| Field | Examples |
|---|---|
| Name | AA_Agreements |
| Account | ABC Company |
| Type | Service Level Agreements |
| Status | Current |

3 In the Name field, click the link.

4 Click the Entitlement view tab, create a new record and complete the necessary fields.

Some fields are described in the following table.

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

5 Click the Contacts view tab, and then click Add to add the contacts to which the entitlement relates.

This is the user who submits the ticket. Be sure to enter the supported channels for the entitlement—for example, if you only support your users over the Web, then select the Internet check box only. Select only the check boxes for the channel you want to support—for example All Products, Phone, Email, and so on.

6 Click the Products view tab, to add the assets the entitlement relates to, create a new record and complete the necessary fields.

When an incident or problem record is created against that asset, the agreement is used.

7 Click the Metrics view tab, create a record and complete the necessary fields.

Some fields are described in the following table.

| Field | Comments or Examples |
|---|---|
| Type | Response Time |
| Value | Enter the recommended time for the escalation and resolution time—for example 4 hours.<br><br>For more information about recommended times for SLA entitlements, see Table 5 on page 36. |
| Units | Days, Hours, Percentage, and so on |
| Priority | ASAP, High, Medium, or Low |
| Service Hours | 24 hours, 7 days a week |

8 Click the Metrics view tab, create a record and complete the necessary fields.

Some fields are described in the following table.

| Field | Comments or Examples |
|---|---|
| Type | Escalation Time |
| Value | Enter the recommended time for the escalation and resolution time—for example, 4 hours.<br>For more information about recommended times for SLA entitlements, see Table 5 on page 36. |
| Units | Days, Hours, Percentage, and so on |
| Priority | ASAP, High, Medium, or Low |
| Service Hours | 24 hours, 7 days a week |

# Setting Urgency and Impact Fields for Incident Records

The urgency and impact of incident records are set based on the Recommended Priority code. Figure 4 on page 35 details the settings for setting urgency and impact fields.

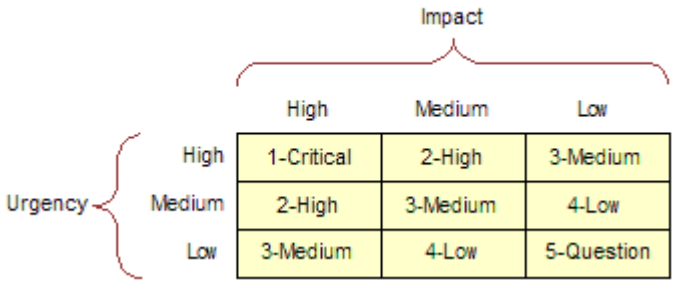


Figure 4. Setting Urgency and Field Records

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

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

Table 5. Recommended Times for SLA Entitlements

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

# 5 Setting Up Employee Self-Service

Siebel Employee Self-Service (ESS) helps managers and employees process routine and frequent transactions such as completing an employee address change or transferring an employee. Employee Self-Service:

- Guides users through necessary procedures.
- Incorporates relevant data.
- Accepts user input.
- Automatically routes transactions for processing and approvals.

This chapter provides information on creating and maintaining Employee Self-Service, and includes the following topics:



## Scenario for Employee Self-Service

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

### Administrator

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

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

### Manager

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

### Approver

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

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

### Employee

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

## Process of Setting Up Employee Self-Service

The following lists show the procedures that administrators and end users typically follow to set up and use Employee Self-Service. Your company may follow a different process according to its business requirements.

### Administrator Procedures

You can import and customize preconfigured forms and create new forms. As Figure 5 shows, the administrator process has two paths. The first path illustrates importing and customizing preconfigured Employee Self-Service forms. The second path is for creating requestor and summary forms. After importing or creating the forms, the administrative process proceeds to testing and releasing the forms.

To set up Employee Self-Service, perform the following procedures:

- Importing a Preconfigured Employee Self-Service Form on page 42
- Customizing a Preconfigured Self-Service Form on page 43
- Designing Employee Self-Service Requestor Forms on page 44
- Creating an Employee Self-Service Summary Form on page 47
- Linking Self-Service Forms to the Inbox on page 51
- Associating ESS Forms with Employee Directory on page 54
- Releasing and Testing Employee Self-Service Forms on page 54

**Related Topic**

About Creating Employee Self-Service Forms on page 40

## End-User Procedures

The end-user process has a single path for requestors. As Figure 5 shows, the first item in the process is for a requestor to choose a form. The process leads to the type of changes the requestor wants—for example change business title, job transfer, or change location. The submit process is then activated—for example confirm business title, job transfer or location. The form is then routed to the approver's Inbox.

To use Employee Self-Service, perform the following procedure:

Accessing and Submitting Self-Service Forms on page 55.

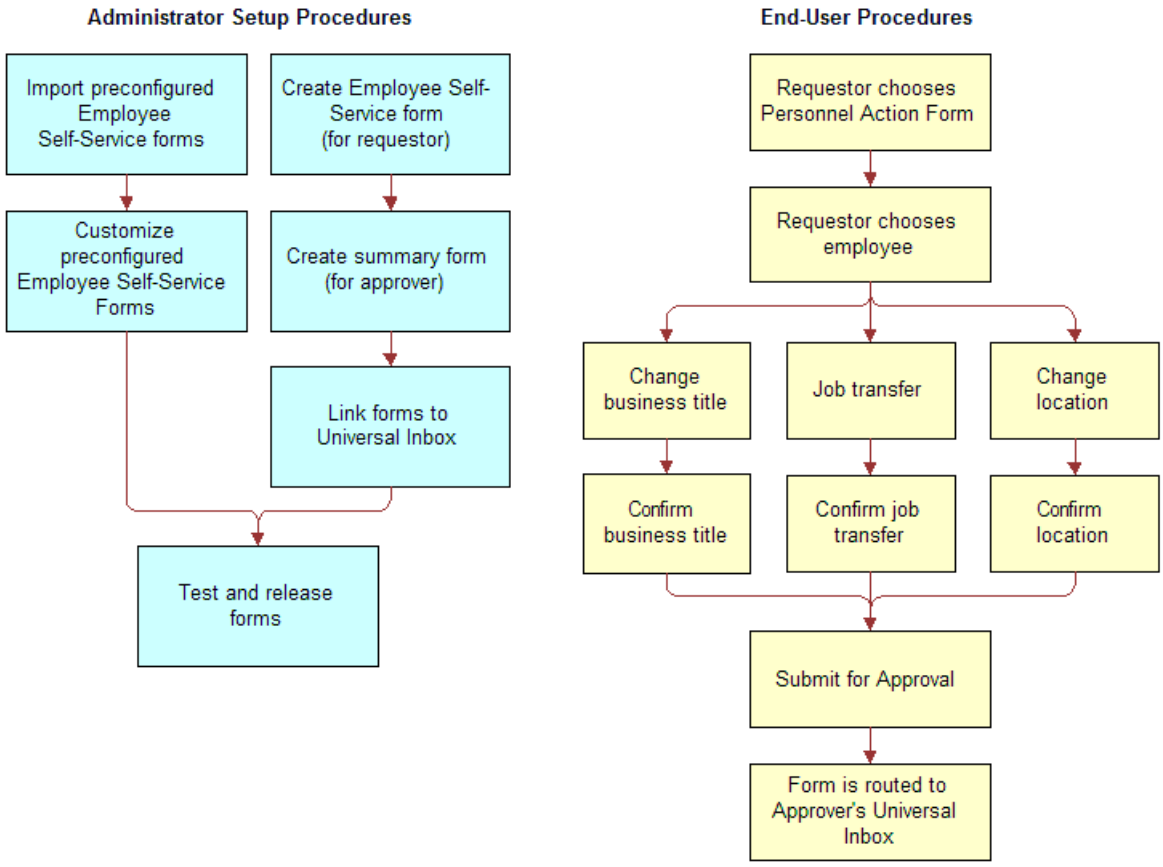


Figure 5. Business Process for Employee Service

# About 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 6, 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.

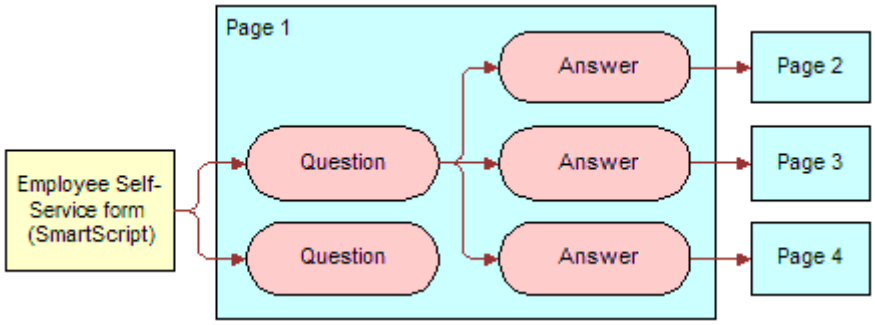


Figure 6. Example of Branching Logic for Employee Self-Service

Employee Self-Service allows you to build employee self-service processes that include the following attributes:

- The processes use branching logic that targets specific user needs.
- The processes are already populated with data from Siebel applications and other databases.
- The processes accept input from users and send relevant changes to the underlying databases after approval.
- The processes can be routed through a graphical workflow editor for further processing and approvals.

Employee Self-Service also includes a preconfigured set of self-service forms. These forms address common issues such as personnel and personal data changes.

After creating an employee self-service form, you can use the Inbox functionality to create an approvals business process that automatically routes the form to specific users for approval. Based on the data entered in the form, your Siebel application or another application can be updated.

### Related Topics

- See *Siebel Applications Administration Guide* for Inbox setup tasks.
- Process of Setting Up Employee Self-Service on page 38

# Importing a Preconfigured Employee Self-Service Form

Siebel Employee Self-Service is preconfigured with several employee forms. These preconfigured forms can be imported to your Siebel application as SmartScripts. After they are imported, the forms can be verified and then released so that you can use them within your Siebel application.

Table 6 describes the preconfigured forms for Employee Self-Service and the types of changes addressed in each form.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

Table 6. Preconfigured Employee Self-Service Forms

| Form | Comments |
|---|---|
| Calling Card Request | This form is used for ordering new calling cards |
| Check FMLA Eligibility | This guided form helps employees find out whether they are eligible for FMLA (Family Leave Medical Act) |
| Employee Survey | This is a workplace survey administered to employees |
| Executive Center Booking | This form lets employees book the Executive Center for customer meetings |
| New Hire Process | This form is used for provisioning a PDA, computer, workspace, and training for a new employee |
| Personal Data Change | This form is used for changes to:<br>■ Name<br>■ Address<br>■ Cell phone number |
| Personnel Action Form (PAF) | This form is used for changes to:<br>■ Business title<br>■ Job transfer (Position/Manager/Division Change)<br>■ Location |
| Time Off Form | This form is used for vacation, sick leave, and other time-off requests |

### *To import employee self-service forms (SmartScripts) from the sample database*

1. Log in to your Siebel application using the sample database.
2. Navigate to the Site Map > Administration - SmartScript > Scripts view.
3. In the Scripts list, select a form (SmartScript), listed in Table 6 to export to your production environment:

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

   The Export Script form appears.

b Click the form (SmartScript) name hyperlink, and then save the form (SmartScript) to a temporary location so that you can import it into your production environment.

Repeat Step 2 through Step 3 (including substeps) for each SmartScript form you want to use in your production environment, and then log out of your Siebel application.

### *To import the form to the production environment*

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

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

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

   The Import Script form appears.

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

   **NOTE:** When importing preconfigured employee self-service forms, choose the Update option. If a script with the same name already exists, the newly imported script replaces the old one.

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

6 In the Add Attachment dialog box Browse for the saved SmartScript form.

7 From the Add Attachment dialog box, click Add, and then, from the Import Script form, click Import File.

   **NOTE:** Each imported form should be tested and then released.

# Customizing a Preconfigured Self-Service Form

You can customize the preconfigured employee self-service forms to meet your organization's needs. For example, you can change the sequencing of the pages and questions, and you can add, delete, and change questions.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

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

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

2 In the Scripts list, select the script you want to change, and then click the Designer view tab.

   The graphical layout for the preconfigured form appears.

3 Update the questions and pages as needed, and then test and release the script.

For more information, see Releasing and Testing Employee Self-Service Forms on page 54.

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

# Designing Employee Self-Service Requestor Forms

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

As an administrator, you can use Siebel SmartScripts to define the requestor forms used within your application. Before you can define a form, you must meet the following requirements:

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

## Preparation

Before you create an Employee Self-Service requestor form, perform the following tasks:

1 **Map out the form.** Design on paper the requestor form you want to create. Use the flow diagram example shown in Figure 6 on page 41 to determine the pages to include within your form (SmartScript), and the questions you want to include in each page.

2 **Create Questions and Pages.** Before you actually create a form, create the questions and pages used in the form. For information on creating questions and pages, see *Siebel SmartScript Administration Guide*.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

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

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

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

a In the Type field, select Employee Self-Service.

   SmartScripts that are set to the Employee Self-Service type automatically appear in the Forms Library. When creating a form in a language other than English, choose the type that corresponds to Employee Self-Service.

b In the First Page field, select the first page you created for the form.

3 Click the Designer view tab, and using the Script Flow Chart, insert questions and pages as needed from the set that you previously created.

4 Release the script, test it, and, if necessary, make changes and rerelease the script.

### Related Topics

- Releasing and Testing Employee Self-Service Forms
- Linking Self-Service Forms to the Inbox
- Effective Scripting for Employee Self-Service Requestor Forms

## Effective Scripting for Employee Self-Service Requestor Forms

Using scripting is not required within Employee Self-Service, however, the functionality of the Employee Self-Service forms can be enhanced through the use of eScript or VBScript. This section provides procedures and tips for using eScript within requestor forms. You can also use VBScript.

**NOTE:** You can use the eScripts within the preconfigured forms as examples. For more information on scripting, see *Siebel SmartScript Administration Guide*.

### Related Topic

Process of Setting Up Employee Self-Service on page 38

## Making a Field Read-Only

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

### *To make a field read-only in a requestor form*

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

2 In the Scripts list, query to find the Employee Self-Service form (SmartScript) you want to modify.

3 Click the Programs view tab.

4 From the Programs list, select Script_Open.

5 In the Program Language field, select eScript, and then click Save.

   In the eScript form, use the script function SetQuestionEnable(false) to set the question to read-only.

For example, the following eScript program converts a question titled Display Employee Last Name within a page titled PAF Change. When this question displays a value extracted from a database, the value is read-only.

```
function Script_Open ()

{

var P1 // SmartScriptPage

var P1Q1 // SmartScriptQuestion

P1 = GetPage("PAF Which Change");

P1Q1 = P1.GetQuestion("Display Employee Last Name");

P1Q1.SetQuestionEnable(false);

}
```

6 Verify that each read-only field has a SetQuestionEnable(false) statement attached to it.

7 In the eScript form, click Check Syntax to locate any syntax problems.

8 In the Programs list, click Save.

## Preventing Duplicate Record Creation

When the form is submitted, field values mapped to a business component field are automatically written to the actual fields by SmartScript. To prevent the Siebel application from writing to the business component field and creating duplicate records, include the Cancel() function within the script_finish program.

### *To prevent duplicate record creation*

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

2 In the Scripts list, select the script, and then click the Programs view tab.

3 In the Programs list, select Script_Finish.

4 In the Program Language field, select eScript, and then click Save.

5 In the eScript field, include the Cancel() function.

For example, the following statement runs the entire SmartScript, but no updates are saved to the database, even after the user chooses Submit.

```
function Script_Finish ()

{

// Cancel saving everything to the database

   Cancel ();
```

}

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

When the form is complete, choose Finished to save data entries.

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

7 Click Check Syntax to locate syntax issues, and save the record.

## Populating a Field in a Form

You can use eScript to automatically populate a form.

### *To populate a field in a form*

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

2 In the Scripts list, select the script you want to modify, and then click the Programs view tab.

3 In the Programs list, select Script_Open.

4 Use the eScript function SetCurrentValue for each field you want to populate.

5 Click Check Syntax to locate syntax issues.

6 Save the program.

# Creating an Employee Self-Service Summary Form

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

## Preparation

Before you create a form, complete the following tasks:

1 Map out the summary form. Use the flow diagram example shown in Figure 6 on page 41 to help decide the pages to include in your form and the questions you want within each page.

- The questions within a summary form are only used to display data to the user.
- Use the requestor form that you previously created to help you determine which questions you want to use in the summary form. Typically, a summary form shows the approver only a subset of the most relevant responses from the requestor form.

2 Determine the questions and the pages used in the summary form. For more information on creating SmartScript questions and pages, see *Siebel SmartScript Administration Guide*.

3 If you plan to copy a question from the requestor form, add the word Summary to the title, as you cannot use the same names for both the requestor form question and the summary form question. This naming-convention rule also applies to naming pages and the SmartScript itself.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

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

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

2 In the Scripts list, add a new record, complete the fields, and save the script.

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

Leave the Type field empty. Do not set the Type field to Employee Self-Service because the summary form would then become visible to requestors. Two forms with similar names can confuse the requestors.

3 Click the Programs view tab, and add a program record.

4 In the Program record, choose Script_Open in the Name field.

5 Choose eScript in the Program Language field.

6 In the Script form, use eScript (or VBScript) to set up the summary form.

After you finish scripting, release the script, test it, and then make necessary changes and release the script again.

```
function Script_Open ()
{
   var PageFirstPage;
   var QuestLastName;
   var szLastName = "";
   var szScriptSessionId = "";
   var boCallScripts;
   var bcCSRunAnswer;
// Get the handles to the page and the questions
   PageFirstPage = GetPage ("PAF Summary");
   QuestLastName = PageFirstPage.GetQuestion ("PAF Summary Employee Last Name");
// Set all the questions read-only
   QuestLastName.SetQuestionEnable (false);
```

```
// Get the script session run id
   szScriptSessionId = GetParameter ("Session.ScriptSessionId");
// Get the "Call Scripts" busobj and "Call Script Run Answers" buscomp
   boCallScripts = TheApplication().GetBusObject ("Call Scripts");
   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;
}
```

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

## Importing Field Values to a Summary Form

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

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

1. Navigate to the Site Map > Administration - SmartScript > Scripts view.
2. In the Scripts list, select the script and click the Programs view tab.
3. In the Programs list, create a program.
4. In the new program record, select Script_Open in the Name field, and eScript in the Program Language field.

   **NOTE:** If you access a business component within your summary form, any operation to that business component creates a page break within the summary form. To avoid the page break, get the handle to the business component in the eScript. Perform any desired operations on it within the eScript. For more information, see *Siebel Applications Administration Guide*.

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

   For more information on making a field read-only, see "Making a Field Read-Only" on page 45.

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

   For more information on using GetParameter, see *Siebel Applications Administration Guide*.

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

   For more information on ways to get the Call Scripts business object, see *Siebel Applications Administration Guide*.

8. In the Programs list, click Save.

# Linking Self-Service Forms to the Inbox

To route an employee self-service form to the Inbox, the form and the inbox must be linked. Figure 7 shows the business process used when linking the form and the Inbox.

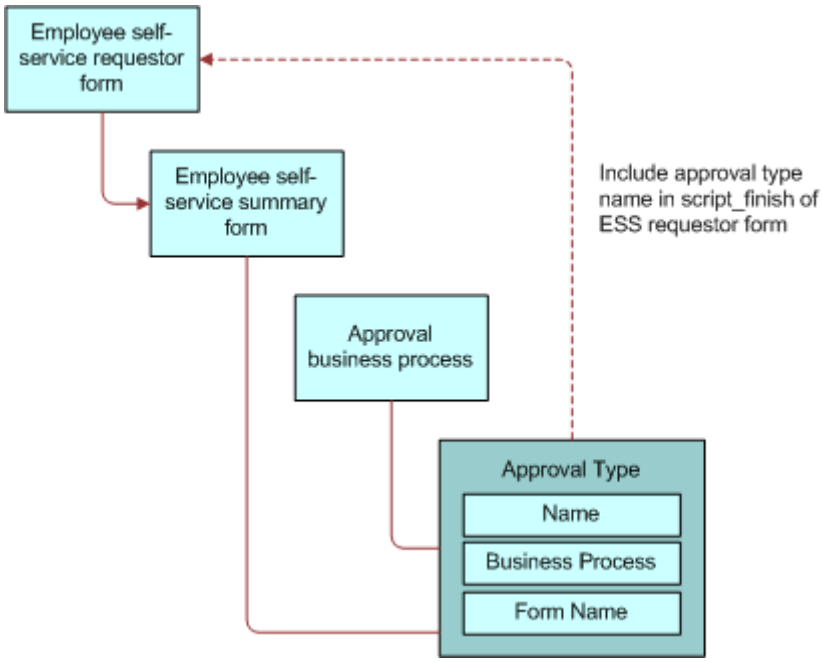


Figure 7. Linking Employee Self-Service Form to Inbox

As an administrator, you can create an approval type to link a form to the inbox. After the approval type is configured, you can reference the approval type name within the employee self-service requestor form. For information about creating an approval type, see *Siebel Applications Administration Guide*.

**NOTE:** The following procedure is required only for new Employee Self-Service forms, not for preconfigured forms. For more information on creating an Employee Self-Service form, see Designing Employee Self-Service Requestor Forms on page 44.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

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

1. Navigate to the Site Map > Administration - SmartScript > Scripts view.
2. In the Scripts list, select the Employee Self-Service form (SmartScript) you want to link to the Inbox.
3. Click the Programs view tab, and in the Programs list, add a new record and complete the fields.
   a. In Name field, select Script_Finish from the drop-down list.
   b. In the Program Language field, select eScript from the drop-down list, and then click Save.

4 In the eScript form, enter the following script:

```
function Script_Finish ()
{
   var szScriptSessionId;
   var szRequester;
   var svc;
   var indata;
   var outdata;
// Cancel saving everything to the database
   Cancel ();
indata =TheApplication ().NewPropertySet ();
   outdata = TheApplication ().NewPropertySet ();
// Get the login name of the user
   szRequester = TheApplication ().LoginName ();
   // Get SmartScript Save Session table Id.
   szScriptSessionId = GetSessionId ();
// ItemObjectId, ItemType, ItemSubmittedBy, and ItemDescription are the
   // required input arguments for the "Universal Inbox.Initialize"
   indata.SetProperty ("ItemObjectId", szScriptSessionId);
   // Item Type is the Approvals Inbox type defined in the
   // Approvals Inbox Administration screen
   indata.SetProperty ("ItemType", "PAFChange");
   // Short Description of the inbox item
   indata.SetProperty ("ItemDescription", szScriptSessionId);
   indata.SetProperty ("ItemSubmittedBy", szRequester);
// ItemQueueDuration, ItemPriority, and ItemComments are the
   // optional input arguments for the "Universal Inbox.Initialize"
   indata.SetProperty ("ItemQueueDuration", "129600");
   indata.SetProperty ("ItemPriority", "High");
   indata.SetProperty ("ItemComments", "Comments from Employee Self-Service");
```

```
    svc = TheApplication ().GetService ("Universal Inbox");

    svc.InvokeMethod("Initialize", indata, outdata);

}
```

5 In the Script field, change the indata.SetProperty ("ItemType", "") parameters as needed.

The second parameter of the function should equal the name of the appropriate Inbox type. For example:

```
// Approvals Inbox Administration screen

indata.SetProperty ("ItemType", "PAFChange");
```

**NOTE:** For more information on Inbox types, see *Siebel Applications Administration Guide*.

6 Click Check Syntax to locate syntax issues.

7 Save the program record.

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

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

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

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

1 Navigate to the Site Map > Administration - Catalog view.

2 In the Catalog Administration list, query for ERM Employee Center.

3 In the Employee Center record, click the link in the Name field.

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

The table that follows describes the applet-category mapping.

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

5 From the Category Detail form, click the link Troubleshooting/Access Instructions.

If the link is not visible, click the drop-down list at the end of the link bar.

6 From the Troubleshooting/Access Instructions list, click New and add the ESS Form from the Pick SmartScript dialog box.

### *To add literature items*

1 From the Category Detail form, click the Literature link.

2 In the Literature list, click Add to add literature items.

### *To add solutions*

1 From the Category Detail form, click the Solutions link.

2 In the Solutions list, click New to add the desired solution.

3 Verify that the correct ESS forms (or solutions or literature) are visible by navigating to the end-user views.

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

# Associating ESS Forms with Employee Directory

You can associate Employee Self-Service (ESS) forms with Employee Directory. For more information, see *Siebel Applications Administration Guide*.

# Releasing and Testing Employee Self-Service Forms

After you finish scripting the employee self-service form, you must first release the script, test it to make sure that it works as anticipated, and release the script again if you have made changes.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

### *To release a script*

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

2 In the Scripts list, select the script, and then click Release.

3 Test the form to make sure that it works as desired.

For more information, see Accessing and Submitting Self-Service Forms on page 55.

**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 43.

4 After you have tested the form, make any necessary changes to the form, and then release it again.

# Accessing and Submitting Self-Service Forms

End users can access forms in the Self-Service area of the HelpDesk Home page, or from the Employee Self-Service link on the site map. After a user selects the appropriate form, the form can be completed and submitted for approval.

**NOTE:** Administrators can use this procedure to test the forms before final release.

This task is a step in Process of Setting Up Employee Self-Service on page 38.

## Accessing Self-Service Forms

End users can access self-service forms using the HelpDesk home page.

### *To access an employee self-service form*

1 Navigate to the HelpDesk home page.

2 From the Self-Service Section, click the Forms Library link.

3 In the Available Forms list, click the link in the Name field for the form you want to access.

4 In the form, complete the necessary fields, and then click Submit.

Required questions are flagged with an asterisk (*).

**NOTE:** Forms can be saved and submitted at a later time even if they are not completed. To save the form and the information you have entered, click Submit Later. You can access a saved form from the My Saved Forms view.

If the form is linked to the Inbox, the form is sent on to the first approver.

## Accessing a Saved Self-Service Form

Use the following procedure to access a saved employee self-service form.

### *To access a saved form*

1 Navigate to the HelpDesk home page.

2 In the Self-Service section, click the Forms Library link.

3 Select My Saved Forms from the navigation bar on the side.

4 In the Saved Forms list, select the form, and click Resume.

## Accessing a Submitted Self-Service Form

Use the following procedure to access a submitted employee self-service form.

### *To access a submitted form*

1 Navigate to Inbox.

2 Click the My Submitted Items link.

3 In the list, select the submitted item.

You can check the status and approval history for items from this view. You can also access a summary of the form you completed.

**NOTE:** To see the entire form, including your answers to questions, navigate to the My Finished Forms view within the Forms Library.

# Index