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1 Introduction

This document is intended to serve as a guide for Hexagon PPM Dealer, Distributor, and Reseller personnel who use Siebel Partner Portal in the role of Support Representative or Support Manager. In August 2016, Hexagon PPM rolled out a new interface for partners. The new interface takes advantage of modern browser technology and offers partners an improved interface to Siebel. Although there are many ways to reach the same outcome in Siebel, this document will outline only the most commonly used or suggested methods.

First-Time Users: See the Siebel Partner Portal Initial Setup section below if the initial setup has not yet been performed or if this is the first time Siebel Partner Portal is being run on a new computer.

2 Navigation

Siebel users navigate through a combination of Screens (tabs) and Views.

2.1 Screens (Tabs)

There are different Views under each Screen providing visibility to filtered data related to the Screen topic. Frequently accessed screens are listed across the top of the page while less-used screens are available under the Site Map.

![Screen and Site Map Diagram]


2.2 Useful Links

The **Useful Links** tab provides employee access to areas of Intergraph Smart® Support without the need to logon to the customer portal. **Useful Links** also includes a link to this user guide. Visit **Useful Links** occasionally to see if any new links have been added or to access the latest version of this user guide. To request a new link be added, submit an SR against SIEBEL_SUPPORT and provide the target URL and a Description.

![Useful Links Tab](image)

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Documentation</td>
<td>View Documentation published on Smart Support</td>
</tr>
<tr>
<td>Intergraph Smart® Support</td>
<td>Customer Response System</td>
</tr>
<tr>
<td>Smart Support Guide for Customers</td>
<td>Intergraph Smart Support User Guide for Customers</td>
</tr>
<tr>
<td>Compatibility Matrix</td>
<td>Compatibility Matrices published on Smart Support (also viewable from View Downloads)</td>
</tr>
<tr>
<td>Answer Search Tips</td>
<td>Search Tips to Use While Searching for Answers</td>
</tr>
<tr>
<td>Quick Reference - Answer Guidelines/Best Practices</td>
<td>Answer Guidelines and Best Practices document, also found in Answer 22376</td>
</tr>
<tr>
<td>Introduction to Partner Portal Open UI</td>
<td>Video Introduction to What Is New in the New Partner Portal Open UI Interface (76 MB)</td>
</tr>
<tr>
<td>KBytes Newsletters</td>
<td>All Published KBytes Newsletters (Chrome/Firefox: right-click, copy in link address, paste into File Explorer)</td>
</tr>
</tbody>
</table>
2.3 Visibility (Data Filter)

The Visibility pull-down menu filters the current output. The output can be filtered before or after executing a query. In the images below, the Visibility filter is being changed from My Customer SRs to All Customer SRs.

![Image showing Visibility filter change]

When changing the filter from one subset of SRs to another (shown below), the previously executed query remains in effect. For example, if the All SR’s query is executed and the filter is set to My Customer SRs, SRs that are assigned to the currently logged in employee will be listed, whether Open or Closed. If the filter is switched to show All Customer SRs, all SRs in the employee’s
organization will be displayed. This includes SRs that are Open or Closed, unassigned or assigned to any employee.
Now the list of SRs appears longer because it shows all SRs, not just those assigned to the currently logged in employee.
2.4 Site Map, Screens, and Views

2.4.1 Site Map

The Site Map offers navigation directly to all Screens and Views within Siebel.
2.4.2 Screens and Views

The image below shows the Service Request screen as it appears by default when the Service tab is selected. The top of the display is a List View which lists SRs belonging to the support organization. The bottom of the display is a Form View or detail view which shows details of the SR currently selected at the top.
The image below shows a Service Request detail view with support activities listed in the related Updates View.

Additional views available while drilled into a Service Request include Attachments, Related Answers, Search Answers, Propose Answer, and Audit Trail.

2.5 Ensure Latest Changes are Saved While Using Siebel – Now Easier with Auto-Save

With the new Open UI interface released in July 2016, in most cases, it is no longer necessary to click Save after every change to a Siebel record. Siebel Partner Portal will now auto-save any change made to a record (such as an SR or Contact Record) as long as a
Siebel navigation button/control is used after updating a record. Therefore, the natural flow of daily activities will cause Siebel to automatically commit the record changes. For example, if the user assigns and SR by updating the SR Owner field from null to an employee’s User ID and then clicks on the Answers tab to go search the knowledge base, Siebel will automatically save the SR assignment without the user having to explicitly click Save.

**Note:** Do not use the browser Back button or suddenly close the Partner Portal client. Doing so will not give Siebel an opportunity to save the current changes.

There are several other ways to ensure the latest changes to a record are saved immediately. The most obvious way is to manually invoke a save by one of the following methods:

- Click the Save button.
- Select Menu > Save Record.
- In many views, `Ctrl` + `S` will save the record as indicate on the Save Record menu option. If the web browser responds to the `Ctrl` + `S` keyboard shortcut instead of sending the keystrokes to Siebel, then this method will not work on the current view. However, as explained above, pressing `Ctrl` + `S` or clicking Save is no longer necessary in many cases.

Siebel will automatically save the current record if the following are true:

- Network connection remains uninterrupted between the Siebel client (Partner Portal) and the Siebel server.
- Another user or Siebel itself has not modified the same record.
- All required fields are properly populated.
- Built-in navigation controls are used to exit the current record. **Note:** Browser navigation controls such as the Back button will not allow Siebel to save the current changes.
2.6 Columns Displayed

Columns can be added to the Service Requests list view by clicking on Menu and selecting Columns Displayed. In the popup window, choose one or more desired columns to make them visible in the list view. (Ctrl + click to select multiple columns.) Click the button to move the new column(s) under Selected Columns.
The newly added columns and existing columns can be rearranged using the ✖️, ▲, ▼, and ✖️ buttons in the Selected Columns pane of the popup window. Click Save to close the popup and return to the previous view.

The rearranged columns will appear in the List View as desired.

Once all desired columns are added, the columns can be dragged to a new horizontal location and/or resized without using the above popup box.
### Service Request (SR) Creation and Handling

#### 3.1 Open an SR for the Customer

To create a Service Request for a customer contact, do the following:

- Go to the Service tab > All Customer SRs view.
- In the SR detail view (Form View) at the bottom of the screen, click New.
- In the Last Name field, enter a few characters of the last name and press Tab or click on the picklist icon. If only one name matches the characters entered, Siebel will auto-complete the first and last name and several other fields. If more than one last name matches the characters entered, the Pick Contact window will open. Select the appropriate contact and click OK.

The On Behalf of field is used when the Analyst is opening an SR under a contact record that is different from the person requesting support. The Contact Account field on an SR represents the Primary Account of the SR Contact. The Cust Account can/will be set to an Account other than the Contact Account when the follow occurs:

1. The contact is associated with multiple Accounts and choses to open an SR against an account other than her primary Account via Smart Support
2. An Analyst determines the SR should be associated with an account that is different from the Contact’s primary Account

The On Behalf of field is most often used to indicate which Account is experiencing an issue while not allowing visibility to the customer. For instance, the Cust Account, Contact, and Contact Account is set to Intergraph Corporation while the On Behalf of is set to ABC Corp. This is useful when a Hexagon PPM consultant is working for ABC Corp and finds a bug in one of our products or just needs assistance from the Product Center Support group and prefers to not bring it to the customer’s attention.
• Enter the **Product** by typing a portion of the product name or searching via the ☰ icon similar to how **Last Name** was chosen above.
• Enter the **Reported Version**.
• Enter brief description of the problem or question in the **Summary** field.
• Enter a complete description or question in the **Description** field.
• Enter the **Cust Priority** based on customer’s perception of urgency of the matter. Any mention of “Priority” that the customer can see on Intergraph Smart® Support is based on the **Cust Priority** field.
• Enter the **INGR Priority** based on the employee’s understanding of the situation. **Note:** Most of the time, the two priorities are the same. Any reference to “Priority” on internal reporting is based on the **INGR Priority** field.

### 3.2 Verify Right to Service (RTS)

• Before working an SR, check the **Substatus**. If the **Substatus** is **Pending RTS**, ensure that there is a valid maintenance contract for the customer and that they are entitled to receive support for the product listed on the SR.
• If there is no contract or the contract has expired, ask local Maintenance Contracts personnel to advise before providing support.
• After RTS is verified, change the SR **Substatus** from **Pending RTS** to **Unassigned**.

### 3.3 Assign SR to Analyst

• If the **Substatus** is set to **Unassigned**, it is ready to be assigned to an Analyst.
• Click on the ☰ icon next to the **Assigned To** field, find an available Analyst, click on the adjacent caret (▶), then click **OK**.

• If the expected employee name does not appear, the product is not listed under that employee’s **Assignment Skill Items**. See the **Assignment Skill Items** section in this document.
Note: If 3.2 and 3.3 are done in proper order, the employee being assigned to the SR will be notified automatically of the assignment. If 3.2 is bypassed, the email notification will not be sent to the SR Owner, but the employee will still see the SR under My Customer SRs. This works well when an employee self-assigns the SR and thus is aware of the assignment without email notification. However, if assigning an SR to another employee, it is suggested that 3.2 and 3.3 are completed in sequence to allow Siebel to notify the SR Owner of the assignment.

3.4 Analyst Works the SR

- Once an SR is assigned to an Analyst, the SR will appear under the My Customer SRs view. My Customer SRs can be accessed from the Home tab or from the Service tab with the Visibility filter set to My Customer SRs.
- After an Analyst is assigned to the SR, that Analyst should review the SR’s Updates and Attachments to see if any communications or files have been added to the SR since it was opened.
- Contact the customer as soon as possible. After contacting the customer, the Analyst must update the Initial Response Update to Done.

Note: If the Initial Response Update is not set Done within 24 hours of being assigned to an Analyst, Siebel will send an email reminder to the assigned Analyst indicating that the Initial Response Update Status to needs to be set to Done.

Note: If using F9 to send an email to the contact (per the Send Email from an SR Using the Built-in Siebel Email Client section below), the Initial Response Update will be set to Done automatically by Siebel.
• Additional actions taken related to the SR must be recorded in the SR under the **Updates** View. To create a new Update, click **New**.

![Update View](image)

• Choose the Update **Type** that corresponds to support activity being recorded.

![Update Type](image)

• The default **Audience** for a newly created SR Update is **Public**. **Public** indicates that the customer (SR Contact) and others at the same company (SR Cust Account) can see this Update when reviewing SRs on Intergraph Smart® Support. An Audience of null (empty) is the same as **Public**. If posting something the customer should not see in an Update, set its **Audience** to
Warning: Customers with Smart Support logins will be able to see the SR and its Public Updates.

- Describe what was done during this support activity (Update) using the **Description** and **Comments** boxes.
• Set **Status** to **Done**.

• If applicable, update the **Extended Status** field. The **Extended Status** field offers a more descriptive status. It is a free text field allowing up to 64 characters. The **Extended Status** is visible to the customer in Smart Support.
An SR typically will look like below after the Analyst has worked with the customer for a while. Other actions that can be taken while working an SR are discussed in the remainder of Section 3.4 below.
3.4.1 Send Email from an SR Using the Built-in Siebel Email Client

Note: Prior to sending email from Siebel Partner Portal, the Siebel Email Client must be set up. See Setting Up the Siebel Email Client for instructions.

The Siebel Email Client in Open UI allows for rich formatting, embedded images, and attachments dragged directly from the local machine into the Attachments dialog box.

- Ensure that focus is on the Service Request (not the Updates applet) detail view and press F9. A popup will appear in which a Recipient can be selected from the provided list or select (None) and click OK. If a recipient is not specified in the recipient selection popup window, one or more addressees can be specified in the email editing screen prior to sending.
Choose a template from the **Body** pull-down list. Once a template is selected, the email address of the employee (sender) will be placed in the **Bcc** field automatically. A copy of the email will be sent to the employee’s email client’s inbox after the message is sent via Siebel. The email can then be copied or moved from the Inbox to the Sent folder, if desired.
### 3.4.2 Record an Email Update Automatically on the SR

It is important to keep the SR current with both outbound and inbound communication. Emails between the SR Owner (Analyst assigned to the SR), other employees, and the SR Contact (customer on the SR) can be recorded under SR Updates automatically.

By following the below requirements, it is easy to add an Update to an SR by email.

1. **SR cannot be in Closed Status.** Closed SRs will not accept “Update” emails, and no Update will be recorded. An SR in any Status other than Closed will have the update added by email (assuming all other requirements are met).

2. **Sender of email must be SR Contact or an Employee.** The SR Contact is indicated by the First Name, Last Name, and Email fields on the SR. An employee is any employee with employee access to Siebel. When the email is received and processed, Siebel looks for a match between the sender of the email and the SR Contact. This is done by a non-case-sensitive comparison of the sender’s email address to email address on the contact record in Siebel. The sender is the SR Contact, an Email from Customer Update will be created on the SR. If the sender is not the SR Contact, then Siebel looks for a match between the sender and the list of employees in Siebel. If the sender is an employee and other requirements are met, an Email from Analyst Update will be created on the SR.

3. **Siebel must be included on distribution of email.** Siebel (siebelprod.ppm@hexagon.com) must be included in the To, Cc, or Bcc box of the outgoing email. This email address is automatically included in the Cc field of most public templates. When using F9 to send email from an SR, Siebel will be included on distribution automatically so that future Reply-All activities will result in the emails being recorded as SR Updates.

4. **Subject must start with Update followed immediately by a single space and the number of the SR to be updated.** Below are examples of subject lines that will or will not work for adding an Update to SR 1-123456789:

<table>
<thead>
<tr>
<th>Subject Lines that Will Work</th>
<th>Subject Lines that Will Not Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update 1-123456789 ...</td>
<td>Some leading text Update 1-123456789 ...</td>
</tr>
<tr>
<td>update 1-123456789 ...</td>
<td>Update SR 1-123456789 ...</td>
</tr>
<tr>
<td>Re: Update 1-123456789 ...</td>
<td>Update SR# 1-123456789 ...</td>
</tr>
<tr>
<td>FW: UPDATE 1-123456789 ...</td>
<td>Re: Re: Update SR 1-123456789 ...</td>
</tr>
<tr>
<td>FW: Re: Update SR 1-123456789 ...</td>
<td></td>
</tr>
<tr>
<td>Update 1-123456789 ...</td>
<td>(includes 2 spaces between Update and the SR number)</td>
</tr>
</tbody>
</table>

**Note:** “...” indicates any other text that exists in the subject. This text will not affect the decision of whether an email is recorded as an Update.
Example of email to be recorded as “Email from Analyst” Activity on SR 1-123456789. The below example assumes Charlie Customer is the SR Contact and Andy Analyst is a current employee in Siebel.

3.4.3 Result of Updating an SR by Email

- Depending on which person sends the email to Siebel, a new Update of Type **Email from Analyst** or **Email from Customer** is recorded on the SR that is in the email’s Subject line. The Update will be visible to the customer on Smart Support.
- Incoming emails are processed when the task load of the Siebel server permits. Email Updates may not always be recorded on the SR instantaneously but usually are present within a few minutes. **Note:** To refresh the view of SR Updates, click **Query, Go** in the Updates list view.
- Attachments and images embedded in the email body (including any signature block) are recorded under the SR Updates’ attachments area so they are not lost. The assigned Analyst will receive email when each attachment occurs. To view the entire email including its attachments and embedded objects, do the following:

```plaintext
Dear Charlie,

.
.
.

Regards,
Andy
```
- Drill into the Update labeled Email from Analyst, Email from Customer, or Email - Outbound.

- Click on the Attachments applet.

  - If a new email being recorded by Siebel includes an attachment with the same name as an existing SR attachment, Siebel will give the most recently received attachment a unique name to keep from overwriting the initial attachment. This may
result in multiple copies of the same attachment, but this less risky than overwriting an earlier file with the same name but containing different contents.
- Other Smart Support users on the same Account as the SR Contact can view the SR under View SRs > Company SRs, including the SR communications history (Updates) and attachments for each SR.

### 3.4.4 Record Inbound Email Updates Manually

If not utilizing the preferred, automatic method of recording inbound emails as described in the above two sections, an email can be recorded manually as described below:

- In the Updates applet, click New.
- Select Update Type of Email - Inbound.
- In the Update Description field, enter something short like, “John provided the complete error…”
  **Note:** If the Update Description is READ ONLY, click on the Update Type field hyperlink (example: Email - Outbound) and update the Description, click Save before using the browser’s Back button to return to the SR detail view.
- In the Updates Comments field, copy and paste the complete email body or other text.
- **Optional:** If the email being recorded includes attachments, embedded images, or rich text that should be preserved, a copy of the email (for example, an .msg file from Outlook) can be attached to the Email - Inbound Update being recorded.
  - If the external email client supports drag-and-drop, drag the email message from the email client (Outlook, for example) to the Windows desktop. Windows will create a copy of the email in an .msg file or other appropriate file type on the desktop.
  - In Partner Portal, click on the Email - Inbound Update Type hyperlink to drill into the Update.
  - Drag the .msg file into the Update’s Attachments area to attach it to the Update. The file will be uploaded and attached to the Update.
  - Click Save before using the browser’s Back button to return to the SR Updates.
  **Warning:** Customers have visibility to files attached in the main SR Attachments view, while attachments under an Update are not visible from Smart Support.
- Set the Update Status to Done.

### 3.4.5 Web Update

When viewing the details of an SR on Intergraph Smart® Support, a customer may submit a Web Update on the SR. The Web Update may consist of additional information not yet shared with Support, or it may be a question. A Web Update essentially is another means of communication between customer and Support similar to email.
When a Web Update is submitted on an SR that has been assigned to a Support Analyst, the SR Owner is notified that a Web Update has been added to the SR. If the SR is not yet assigned and the SR has been opened for more than 12 hours, the Support Manager is notified instead. When starting to work a new SR, the Analyst should look at the SR Updates to see if any incoming communications, such as a Web Update, need to be reviewed before contacting the customer.

### 3.4.6 SR Attachments

Files can be attached to an SR via Intergraph Smart® Support or Partner Portal.

#### 3.4.6.1 Customer (SR Contact) Adds/Retrieves an Attachment via Intergraph Smart® Support

The SR Contact can add/retrieve a file to/from an SR using Smart Support. To add an attachment to an SR, logon to [Intergraph Smart® Support](#), go to the appropriate View SRs screen, locate the SR, and click on the SR. Use the button to add a file or drag a file onto the Related Attachments area of the SR detail view.

![Related Attachments](image)

Existing attachments will be listed below the Related Attachments label. An attachment can be downloaded by clicking on the file title and saving the file on the local machine.

#### 3.4.6.2 Employee Adds/Retrieves an Attachment via Partner Portal

Employees can add/retrieve a file to/from an SR using one of Partner Portal’s SR Views. Go to the Service or Home tab and select the appropriate view of SRs that will provide access to the relevant SR. Query for the SR, and click on the SR number hyperlink to view a detail view of the SR. In the lower applet, click on the Attachments tab.

To add an attachment to an SR, drag the file onto the white area below the list of existing attachments. Existing attachments will be listed in the Attachments applet. An attachment can be downloaded by clicking on the file title
and saving the file on the local machine.

3.4.7 Relate an Answer to the SR

Before closing the SR, the Analyst must relate an Answer to it unless there is a valid reason not to do so.

- From the SR detail view, use Search Answers tab to search for relevant Answers to be linked to the SR. See the Link an Answer to an SR section below for instructions.

- If an Answer does not already exist which will resolve the issue reported in the SR, the Analyst should propose a new Answer per the Propose a New Answer section below. The newly proposed Answer will automatically be linked to the SR if submitted from the Propose Answer tab beneath the detail view of an SR.

- If there is a reason not to relate an Answer to the SR, the Analyst must create an Activity under the SR with Activity Type of KB Article Not Required and enter a reason in the Description field. Set Update Audience to Internal.
3.4.8 Escalate an SR to 2nd Level Support

If an SR cannot be resolved locally, it should be escalated to the Product Center. From an SR that is assigned and is ready to be escalated, click the Escalate button. **Note:** An SR that is unassigned cannot be escalated. Click **OK** to escalate the SR.

![1st Level SR](image1)

When the 2nd level SR is created, it is almost fully completed but is waiting for further input from the 1st Level Analyst before being sent to 2nd Level. The following should be completed within 10 minutes, if possible. After 10 minutes, an email is automatically sent to the 2nd Level Support notifying them of the arrival of the SR, but updates can still be made on the SR.

- Update the **Description** to include additional information about what steps have already been tried in an attempt to correct the issue or answer the question. Remove any unnecessary information that does not apply to the issue/question.
- Translate the **Summary** and **Description** into English.
- If an attachment exists on the 1st Level SR that might be helpful to 2nd Level, make a note in the **Description** for the 2nd Level Analyst to see the 1st Level attachment. There usually is no need to re-attach the file(s) to the 2nd Level SR.
- Click **Save** or browse elsewhere in Siebel.

![2nd Level SR](image2)
3.4.9 Close an SR

To close an SR, set the Status to Closed. Before allowing the Status to be set to Closed, Siebel will confirm that an Answer has been linked to the SR or that a KB Article Not Required Update has been added. If neither is present on the SR, Siebel will remind the Analyst with the below message.

![Error message]

4 Answers (Knowledge Base Articles)

4.1 Search for Answers

Answers are accessed from the Answers screen and from within a Service Request.

4.1.1 Main Answers Tab

A search of the knowledge base can be done from the main Answers tab at the top of Siebel Partner Portal.

- Click on the Answers Tab.
- Select Product.
- Enter a Search Phrase.
- Click Search.

4.1.2 SR Search Answers Tab

A search of the knowledge base can also be done from the Search Answers applet beneath the SR detail view.

- From the detail view of an SR, click on the Search Answers tab.
- Product will default to that of the SR Product but can be changed for this search, if desired.
- Enter a Search Phrase and press Enter or click Search.
4.1.3 SR Smart Assist Tab

The **Smart Assist** tab under the SR detail view shows the top five Answers for the SR Product if using the SR Summary as the **Search Phrase** of an Answer search. If the customer opened the SR via Smart Support, Answers displayed during the **Create SR** process would be similar to the Answers viewed by the employee in the **Smart Assist** view. Example:

![Smart Assist Tab Example](image)

4.2 Linked Answers

4.2.1 Link an Answer to an SR

If an Answer relates to the subject of the SR, the Answer should be linked to the SR. This will help the knowledge base system become “smarter” about finding relevant answers for future searches by employees or customers.

- From the **Smart Assist** tab or **Search Answers** tab, search for and drill into the desired Answer and click **Link to SR**.

![Link to SR Example](image)
4.2.2 View Related Answers

When viewing the detail view of an SR, the Answer Linked indicator (read-only, not settable) signifies that the current SR has one or more Answers linked.

- To view the Answer(s) linked to the SR, click on Related Answers.

- Click on the Answer’s heading to view the Answer.

4.2.3 Unlink an Answer from an SR

If an Answer is found to not be relevant to the subject of the SR, the Answer should be unlinked from the SR. This will help the knowledge base system from incorrectly relating the Answer to the similar SRs in the future.

- From the Answer detail view, click Unlink From SR to remove the relationship between the Answer and the SR.

- Propose Update can be used suggest improvements to the Answer to better distinguish the Answer’s content from the issue described in the SR being unlinked. See the Propose an Update to an Existing Answer section below for more information.
4.3 Answer Status (Visibility)

Answer Status determines an Answer’s visibility. An Answer’s Status can be seen within each Answer in the ribbon under the summary. A description of each Status follows.

**External** – The Answer is visible to all employees and customers. Employees (internals) view the Answer via Siebel Partner Portal. Customers (externals) view the Answer via Intergraph Smart® Support. Employees can also use Smart Support to view External Answers.

**Internal** – The Answer is visible only to employees via Siebel Partner Portal. (Hexagon PPM employees see the same Internal Answers in their employee interface as well.) The information in an Internal Answer is for the knowledge of the support Analyst to assist customers and is not to be exposed to or shared with customers. The information in an Internal Answer is withheld from the customer to avoid negative effects if the directions within the Answer are not followed properly.

**Proposed** – The Answer has recently been proposed and is visible only to employees at this time. A Knowledge Management admin will review the proposed Answer, edit it with proper formatting and layout, and publish the Answer. The Answer will be published either as Internal or External based on its content.

**Review External** – An update has been proposed for the current External Answer. The update proposed has not been published to the Answer yet, so only the currently published External Answer is visible to employees and customers. A Knowledge Management admin will review the External Answer, make any accepted changes, and re-publish the Answer as External.

**Review Internal** – An update has been proposed for the current Internal Answer. The update proposed has not been published to the Answer yet, so only the currently published Internal Answer is visible to employees. A Knowledge Management admin will review the Internal Answer, make any accepted changes, and re-publish the Answer as Internal.

**Obsolete** – An Answer that is no longer valid/relevant will have its Status set to Obsolete. Obsolete Answers cannot be seen by employees or customers.
4.4 Propose a New Answer

Before proposing a new Answer, please review the Answer Guidelines and Best Practices document for information on how to write effective knowledge base articles. This guide can be retrieved quickly from within Siebel Partner Portal via the Useful Links tab.

Further training on proposing effective Answers can be arranged by contacting the Hexagon PPM Customer Relationship Management (CRM) group.

Search existing Answers to determine if an Answer already exists for the topic being proposed. If no Answer exists, propose a new Answer as follows:
• In the main **Answers** tab > **Propose Answer** view, or from the **Propose Answer** tab beneath the detail view of an SR, complete all fields as required by Siebel and according to the **Answer Guidelines and Best Practices**.

![Propose Answer screenshot]

**Note:** If the Answer applies to more than the product selected in the **Product** field, list the additional products in the **Environment** field. The Knowledge Management admin can properly associate the Answer to multiple products.

• Click **Submit** to send the proposed Answer to the Knowledge Management Administrator (KM Admin) for the Product’s Suite or click **Save Draft** if it is necessary to complete the proposed Answer later. **Save Draft** can be used for only one Answer at a time.

**Note:** A proposed Answer is not visible to customers on Smart Support until the KM Admin sets it to **External**.

### 4.5 Propose an Update to an Existing Answer

If it is determined that an existing Answer can be improved, propose an update to the Answer.
- Drill into Answer.
- Click Propose Update.
- Enter a description of the proposed changes in the Propose Update field.
- Click Submit Update.
4.6 Internal-Only Content

If there is content that should not be visible externally to customers, enter that information between a header and footer labeled:

*****"THIS IS AN INTERNAL ONLY FIELD. DO NOT SHARE THIS WITH A CUSTOMER"*****

Internal-only information is to be offset from external content as shown below.

Following this format will allow the Knowledge Management Administrator (KM Admin) to recognize the **Internal-Only** content and format it appropriately.
4.7 Include an Inline Image or Linked File (Attachment)

When proposing an Answer, sometimes it is necessary to include an image or file. Use the following to alert the KM Admin when an Image or File needs to be included in a newly proposed Answer:

Email the image or file to the appropriate Product Suite KM Admin Distribution List with the Subject: Answer Image/File: “Answer Summary”

Example:

See the Answer Guidelines and Best Practices for more information on when to include an image or file.

Knowledge Management Administrator Distribution List

<table>
<thead>
<tr>
<th>Product Suite</th>
<th>Email Address</th>
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<tbody>
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</tbody>
</table>
5 Contacts

5.1 Create a Contact

- First, ensure the contact is not already in the system by querying for the contact under the Contacts screen using possible variations of the person’s name.
- To add a new Contact, go to the Accounts screen and query for the contact’s Company (“Account”).
- Click on the Account Name.
- In the Contacts applet at the bottom, select New and in the Add Contacts popup window, click New again.
- Enter First Name, Last Name, Email, and any contact information collected for the contact.
- To request Intergraph Smart® Support access for the newly created Contact, continue with section below.

5.2 Request Intergraph Smart® Support Access for a Customer Contact

- With the Contact highlighted in the list view, press F9 to start a new email.
- In the Send Email popup window,
  1. Important: Remove the Contact’s email address from the To box.
  2. From the Body pulldown menu, select Contact Login Request.
  3. Remove the email address from the Bcc box unless a copy of this email is desired.
  4. Click Send.

The email will be sent to Siebel, and Siebel will create an SR for SIEBEL_SUPPORT with the sender/employee as the contact. The Customer Relationship Management (CRM) group will process the request. When the user is enabled, login information will be sent to the user. The requestor will be Bcc’d when the user is sent their Smart Support User ID. (The password email is not shared with the requestor.) This is done to acknowledge that the user has been sent their User ID. CRM will close the SR requesting customer access.

5.3 Request Intergraph Smart® Support Access be Disabled for a Former Customer Contact

Whenever it becomes known that a contact is no longer associated to a customer Account, the contact should be disabled from using Intergraph Smart® Support. To disable a user’s Smart Support access and have them disassociated from their account:

- Go to Contacts and query for the contact that should be disabled from Smart Support access. With the Contact highlighted in the list view, press F9 to start a new email.
• In the Pick Recipient popup window, leave (None) selected, and click OK.
• From the Body pulldown menu, select Contact- Disable/Remove.
• [Optional] Remove your email address from the Bcc box.
• Click Send.

The email will be sent to Siebel, and Siebel will create an SR for SIEBEL_SUPPORT requesting that the contact be disabled from Smart Support access and be removed from the associated Account. CRM will notify you via the SR when this is complete.

6 Siebel Partner Portal Initial Setup

6.1 Set Time Zone and Locale

• Go to Site Map ( bölge ) > User Profile > Profile.
• Click on the Select icon ( ⚙️ ) beside Time Zone.
• Select the local time zone and click OK.
• Click on next to Locale Name and select a country/region. This will cause Siebel to display dates and times in the format most commonly used in the local region/country, for example, 31/12/2015 instead of 12/31/2015.
• Log out and log in again for the above changes to take effect.
• Now all date and time stamps in Siebel will display in the selected time zone and format.

6.2 Configure Siebel Email Client

6.2.1 Create a Communications Profile

1. Go to Site Map ( bölge ) > Communications > My Profiles.
2. In the Profiles applet, click New.
3. Enter first and last name into the Name field.
4. Copy Internet SMTP/POP3 Server and paste it in the Driver field.
5. In the Profile Parameter Overrides applet, click New.
6. In the pull-down menu under Name, select Reply-To Address.
7. Enter email address under Value.
8. Click New.
9. In the pull-down menu under Name, select From Address.
10. Enter email address under **Value**.

![Profile Configuration](image)

### 6.2.2 Configure Outbound Communications

11. Go to **Site Map** > **User Preferences** > **Outbound Communications**.
12. Set **Default Profile** to newly created communications profile.
13. Set **Email Client** to **Siebel Email Client**.
14. Set **Default Message Format** to **HTML**.
15. Set **Locale** to **ENU**.

**Note:** Setting Outbound Communications Locale to anything other than ENU can cause F9 email templates not to function.

6.3 **Assignment Skill Items**

Before an employee is able to have SRs assigned to them, the employee must have **Assignment Skill Items** listed. SRs can be assigned to an employee for any Product listed in **Assignment Skill Items**. To set up **Assignment Skill Items**, do the following:

- Go to **Site Map** > **User Profile** > **Profile**.
- Under the **Assignment Skills** section, add **Product** (if not already displayed as a Skill).
- Under **Assignment Skill Items**, add each of the products being supported by the employee.
- Click **Save**.

6.4 **Save a Shortcut to Siebel Partner Portal**

Once successfully logged in to Siebel, the employee likely will want to save a bookmark/favorite/shortcut to the Siebel Partner Portal. If creating/saving a shortcut to Siebel, please ensure the URL points to [http://crmweb.intergraph.com/partnerportal_enu](http://crmweb.intergraph.com/partnerportal_enu) as a target. Anything following **partnerportal_enu** should be removed from properties of the shortcut/favorite.
7 Document Revisions

11/13/07  1.1  Updated the Request eCustomer Access section to show that we send email to requestor for forwarding to customer.

10/15/08  1.2  Added Escalate button instructions. Added Columns Displayed section.

12/14/09  1.3  Removed section on View Links because View Links no longer exist in Partner Portal.

09/28/10  Replaced Siebel 7.7 screenshots with Siebel 8.1 screenshots.

03/10/11  Updated Assignment Skill Items section to have user go to User Profile > Profile.

03/14/11  Updated page layout to display more clearly in presentations.

03/17/11  Updated the table of contents and changed the Contact Login Request section to show that we will send login instructions directly to the end-customer.

12/15/13  Added mention of Useful Links screen and Updates for Smart Support.

1/122/15  Updated information and screenshots related to redesigned Service tab which replaces the former Service and Self Service tabs.

8/11/16  3.00  Created new document in landscape format for easier reading on screen. Updated screenshots to match current release of Partner Portal with its new Open UI interface.

9/2/16   3.01  Added missing step in Section 5.2 - Request Intergraph Smart® Support Access for a Customer Contact.

1/31/17  3.02  Added clarification of location of stored emails under Result of Updating an SR by Email section. Replaced all occurrences of Intergraph® Smart Support with Intergraph Smart® Support. Added missing info in 5.3 Request Intergraph Smart® Support Access be Disabled for a Former Customer Contact.

2/9/17  3.03  Added instruction to included Inline Image or Linked file to proposed Answer.

3/16/17  3.04  Removed “New as of August 2016” markers. Edited to signify that any current employee in Siebel can add an Email from Analyst Update on an SR.

4/13/17  3.05  Added bullet describing the user of the On Behalf of field.

9/11/17  3.06  Renamed Admin Contact Resources to KM Admin Distribution List to match same table in Siebel Service User Guide. Updated email addresses in the table. Updated references of “Intergraph” to “Hexagon PPM” where appropriate. Added Web Update section.
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<td>3.07</td>
<td>Added instructions on linking an Answer to the SR or adding KB Article Not Required prior to closing SR.</td>
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<tr>
<td>7/2/18</td>
<td>3.08</td>
<td>Updated (simplified) Request Intergraph Smart® Support Access be Disabled for a Former Customer Contact section.</td>
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