



**Oracle /Siebel**  
*Customer Relationship  
Management (CRM)*  
**1.0.2**

**ORACLE®**

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**SIEBEL**  
**CUSTOMER RELATIONSHIP  
MANAGEMENT**

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Siebel	Version 1.0	01 Sept. 2009	
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## 1.0 CRM Process Flow Diagram

Internet Explorer (IE) version 9 or higher, is required to view CRM. In order for sustaining engineers to utilize the Call Center, Siebel ActiveX plug-ins will need to be installed on the client's machine. All other users view the E-Service interface. No plug-ins are required for E-Service.

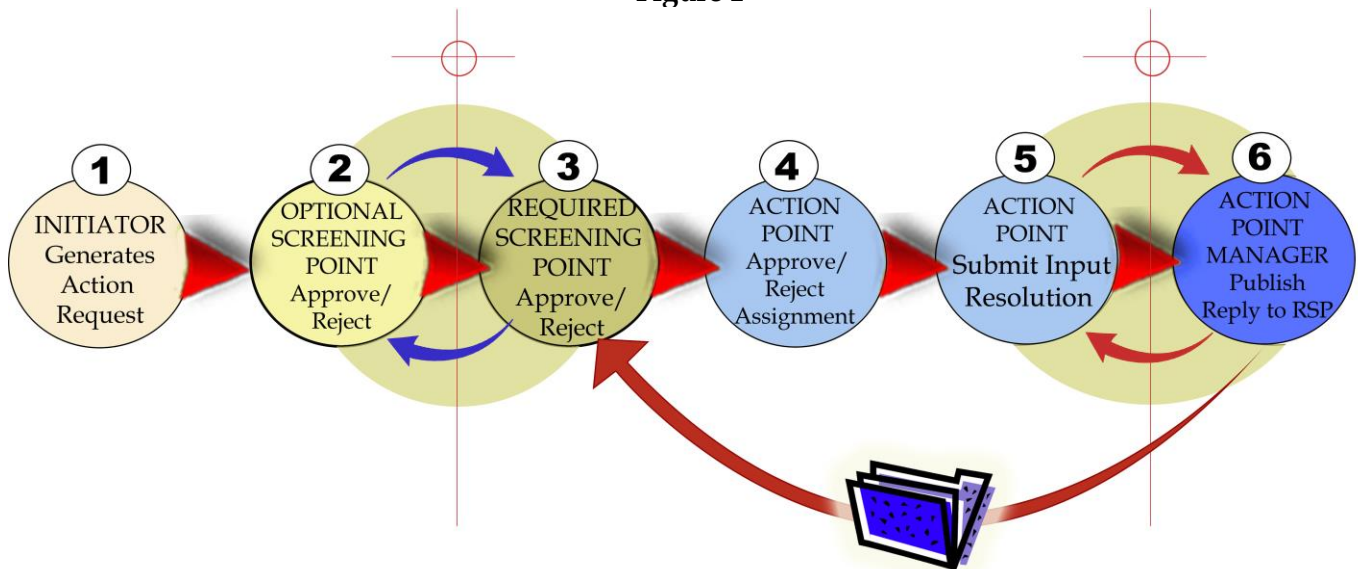
There are potentially 5 types of users discussed in this training document, the Initiator, Optional Screening Point (OSP), Required Screening Point (RSP), Action Point (AP) and the Action Point Manager (APM). The Initiator has permission to create an AR. The Screening Points have permission to create, approve, reject, and maintain an AR. The Action Points have permission to maintain an existing AR once they are assigned to it. The following illustration shows the users relationships.

The Optional Screening Point and Required Screening Point may send notes to each other before the RSP submits to the Action Point. The OSP would submit the file. The RSP would reject the file to send it back to the OSP. The Optional Screening Point does not exist at all locations

The Action Point and Action Point Manager may send notes to each other before the APM publishes the file back to the customer. The AP submits the file and the APM rejects the file to send it back with notes to the AP. These notes may or may not be published when the AR response is sent to the RSP.

There are three types of resolutions at the time of any submission. Interim - under deliberation. Final - RSP has approved the resolution, and Revised - Final.

Figure 1



Sustaining Engineering responds with a resolution. Check email confirmation to ensure a request has been submitted. This is a configurable option which may be turned ON or OFF by the system administrator.

## **2.0 *Searching for Similar Requests***

Before making a decision to accept or reject this AR it would be a good idea to query for similar or related AR's. A little research at this point may identify cause & effect relationships in the deficiency being requested. One option is to query for a list of all Aircraft Variant (CTOL, STOVL or CV) related AR's, perform an aircraft type query.

First, your search results will only display other organization AR's if the outside organization has authorized the connection. This is role and organizational policy based. Some roles may be able to view other organizations and others may not.

### 3.0 Day in the Life User Activities

The following list identifies the duties required for each role on a daily or weekly basis.



1. INITIATOR: Query for all:
  - a. "RESOLVED" Action Requests.
  - b. "NEW" Status with OSP/RSP Return to Initiator Sub Status.
  - c. "SUBMITTED" Action Requests.



2. OPTIONAL SCREENING POINT (OSP): Query for all:
  - a. "SUBMITTED" Status and "Pending OSP Approval" Sub Status.
  - b. "ANSWERED" Status and "Pending OSP Acceptance" Sub Status.
  - c. "RESOLVED" Action Requests.



3. REQUIRED SCREENING POINT(RSP): Query for all:
  - a. "SUBMITTED" Status and "Pending RSP Approval" Sub Status.
  - b. "ANSWERED" Status and "Pending RSP Acceptance" Sub Status.
  - c. "RESOLVED" Action Requests.



4. ACTION POINT (AP): Query all AR's under "My Assigned ARs" View.
  - a. "SUBMITTED" Status and "Pending AP Acceptance" or "In-Work" Sub Status.
  - b. "RESOLVED" Action Requests.



5. ACTION POINT MANAGER: Queries all AR's under "My Team's ARs" View.
  - a. "Answered Proposed" Status and "Pending APM Approval" Sub Status.
  - b. "ANSWERED" Status and "Rejected by OSP" or "Rejected by RSP" Sub Status.
  - c. "RESOLVED" Action Requests.

## 4.0 Creating an Action Request



CRM Action Requests are electronic submissions used to document issues, problems and anomalies. Typically the Initiator generates these requests. The Optional Screening Point or Required Screening Point may submit these requests.

In this chapter you will create an AR with an attachment and submit the AR on to the Optional Screening Point (OSP) for review. If the OSP does not exist at your location the AR moves directly to the Required Screening Point (RSP). Keep in mind the OSP or RSP may also generate new AR's.

**Step 1.** INITIATOR: Before creating an Action Request, check alerts on the right hand portion of the window. Alerts are created by the sustaining engineer or administrator and may be sent to all users, a division/organization and/or a position. To open a message, click the [blue text hyperlink](#).

**Step 2.** INITIATOR: Click the "Generate/View My Action Request" text link to create a new Action Request.

### Initiator Default Window

The screenshot shows the 'Initiator Default Window' for the F-35 JSF ALIS CRM system. The page header includes 'F-35 JSF ALIS CRM' and 'The F-35 JSF Team' with a 'Log Out' link. Navigation tabs are 'Home', 'Action Requests', 'Alerts', and 'My Contacts'. The main content area displays a 'CRM Home' section with a welcome message: 'Welcome, AR Initiator!! You last visited our site on 09/06/2007 10:25:49' and the date 'Wednesday, September 12, 2007'. Below this is the 'F-35 JSF Service & Support' section, which includes a 'My Links' box with links for 'Generate/View My Action Requests' and 'View All Action Requests (Read Only)'. To the right is a 'My Alerts' section with a search query and a list of alerts. One alert is highlighted with a red arrow and the text 'Check Alerts every 24 hours!'. The alert details are as follows:

Abstract	Message Body
Testing SSE ALERT	URGENT!!!! Please replace item on the aircraft.
SA testing	Testing another alert

### 5.0 Optional Screening Point Process Initial AR's

The Action Request (AR) will now appear on the Optional Screen Point (OSP) and the Required Screening Point's List view. The status will display as "Submitted" With the Sub status "Pending OSP Approval".

Object	Value or Action
Status	'Submitted' - <i>If OSP Submit Action Request</i> 'New' - <i>If Returned to Initiator</i>
Sub-Status	'Pending RSP Approval' - <i>If OSP Submit Action Request</i> 'Returned to Initiator' - <i>If Returned to Initiator</i>
History Log	Submission recorded with timestamp and user id under History Log view tab
Email	Email sent to the AR Submitted Distribution List. This is configurable.

