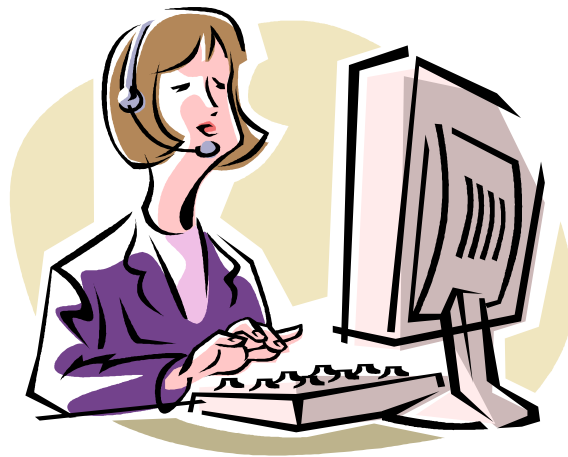# Primus Customer Solution Knowledgebase

LEARNER GUIDE

T··Mobile··

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TABLE OF CONTENTS

Lesson One: Introduction to Primus

Lesson Introduction

This lesson introduces you to T-Mobile's customer solution knowledgebase—Primus eServer iView—and gives you a foundation for the rest of this module.

Lesson Goals

At the end of this lesson, you will be able to:

- Describe what Primus is and how it will be used at T-Mobile.

- Define your role in using Primus.

- Demonstrate how Primus affects customer service and call handling at T-Mobile.

Why Is This Lesson Important?

This lesson is important because it provides a conceptual framework for understanding why and how Primus is being implemented at T-Mobile.

Terms and Acronyms

TERM/ACRONYM	MEANING
Knowledgebase	A centralized system for capturing organizational knowledge about products, services, and technologies.
Knowledge Management	The management of an organization's collective knowledge.
Primus eServer iView	T-Mobile has chosen Primus eServer iView as the knowledgebase that has the features and functions our customer service representatives and customers need most. Its Web-based user interface is both easy to use and widely accessible throughout the organization.

Primus Overview

T-Mobile has chosen a knowledge management tool (referred to as a "knowledgebase") called Primus eServer iView, developed by Primus Knowledge Solutions, Inc., to help customer service representatives search for and create solutions to customer questions. Specifically, Primus helps you to:

- Understand, explore, and capture the technical details of customer problems.

- Spread support knowledge throughout T-Mobile by efficiently recovering and reusing solutions created by other customer service representatives.

- Create solutions to specific problems that others can later reuse so that support problems are solved one time only.

Even if Primus doesn't give you the specific solution to your problem, it can help you to develop a strong problem description that you can use to escalate the problem to another tier of customer service.

Primus enables you to search multiple online resources simultaneously for solutions to customer problems, improving both accuracy and response time on your calls. Additionally, you can contribute your own solutions to Primus.

How Does Primus Differ From StreamLine?

Primus does not replace StreamLine! In fact, many Primus solutions are linked to StreamLine content. Primus is another place to look for wireless data and technical support solutions.

How Primus Affects Customer Service

Each customer service group has a specific role in handling customer calls, and Primus doesn't change that. Like Samson and Remedy, Primus is a tool that can be used by *all* customer service representatives.

Because Primus searches so many resources, including StreamLine, it enhances the customer's experience, as well as yours, by providing ***more accurate solutions in less time!***

Your Role in Using Primus

Primus enables you to search for and create customer solutions in one place. Not only do you benefit from Primus' powerful search capabilities, but your knowledge plays an important role in making Primus a reliable and substantial resource for customer solutions.

- ***Customer Service Representatives*** search for and create solutions.

- ***Publishing and Process Teams*** review and implement solutions.

Search Using Natural Language

Primus eServer enables you to use natural language to search for solutions both within its knowledgebase and in external documents (for example, PDFs). Natural language, as opposed to a query language, enables you to search for solutions using natural phrasing, without having to remember any special search operators.

Create Your Own Solutions

No longer do you have to rely on e-mail to communicate customer solutions at your call center. When a suitable solution doesn't exist, you contribute your own valuable knowledge to T-Mobile's knowledgebase! This way, important workarounds and detailed steps become documented, searchable solutions available to all customer service representatives at call centers nationwide. Once submitted, after a brief review, new solutions are published in Primus. *Your knowledge* becomes a valuable resource for your fellow employees.

Activity – In Review…

Instructions:

Write the answers to these questions, in the spaces provided, and then review them with the class.

1. Why is Primus being implemented at T-Mobile?

2. How is Primus going to change your job as a customer service representative?

3. What two main Primus functions will you be using as a customer service representative?

Key Point Summary

Following are the most important points to remember from this lesson:

- Primus eServer iView is a new customer service tool being implemented in T-Mobile call centers nationwide.

- Primus enables customer service representatives to search for and create solutions to customer problems in its knowledgebase.

- Primus is another resource for finding solutions to customer problems, but does not replace StreamLine.

Lesson Two: Navigating Primus

Lesson Introduction

This lesson introduces you to the Primus eServer iView user interface and encourages you to explore its functionality.

Lesson Goals

At the end of this lesson, you will be able to:

- Log in and out of Primus eServer iView.

- Navigate the tabs and toolbars of the eServer iView user interface.

- Explain, generally, the Options available to customize Primus functionality.

- Describe two help options available for Primus.
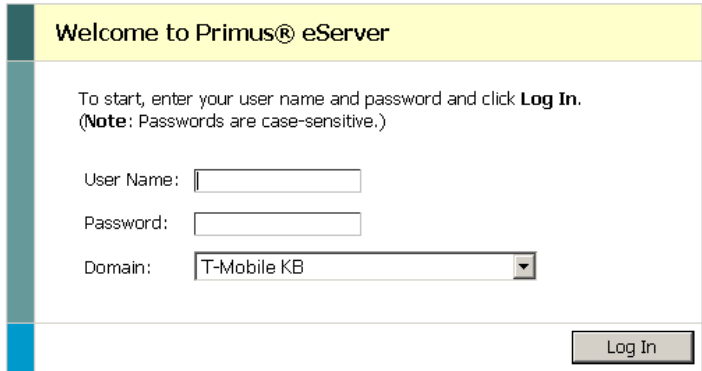
Why Is This Lesson Important?

This lesson is important because it introduces you to the Primus eServer iView user interface and its functions.
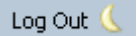
Logging In and Out

Your login is associated with your use of Primus (when you link and submit solutions) as well as any Options you set up. Therefore, logging in with your unique password each time you use Primus is essential.

Step Action – Logging In and Out

Step	Action: Log In to Primus
1	In your Internet browser address bar, type (add this to your Internet favorites list, also): http://cckb.internal.t-mobile.com/iview/iview/ui/eserver.asp
2	Type your user name and password (domain should already appear). **NOTE** The password is case sensitive.
3	Click **Log In**.

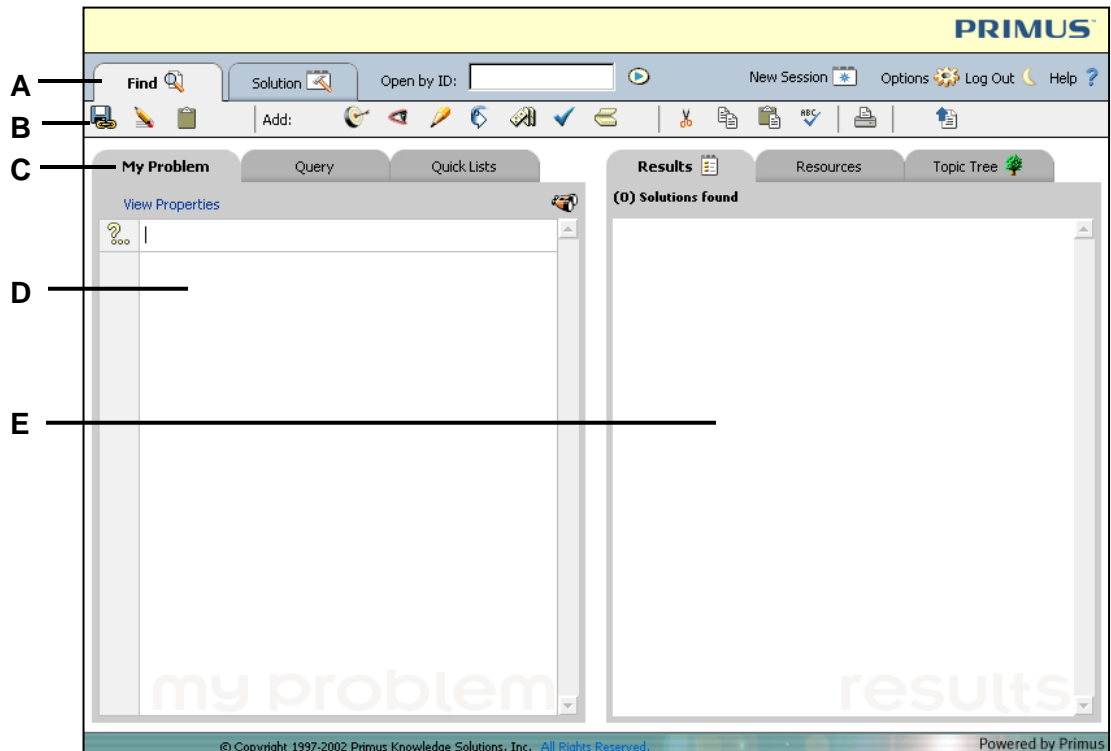| Step	Action: Log Out of Primus
1	Click ⬛ Log Out 🌙 .

Navigating the iView Interface

The main navigation bar clearly shows you that Primus has two primary functions:
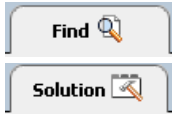
- Search for solutions (Find Window)
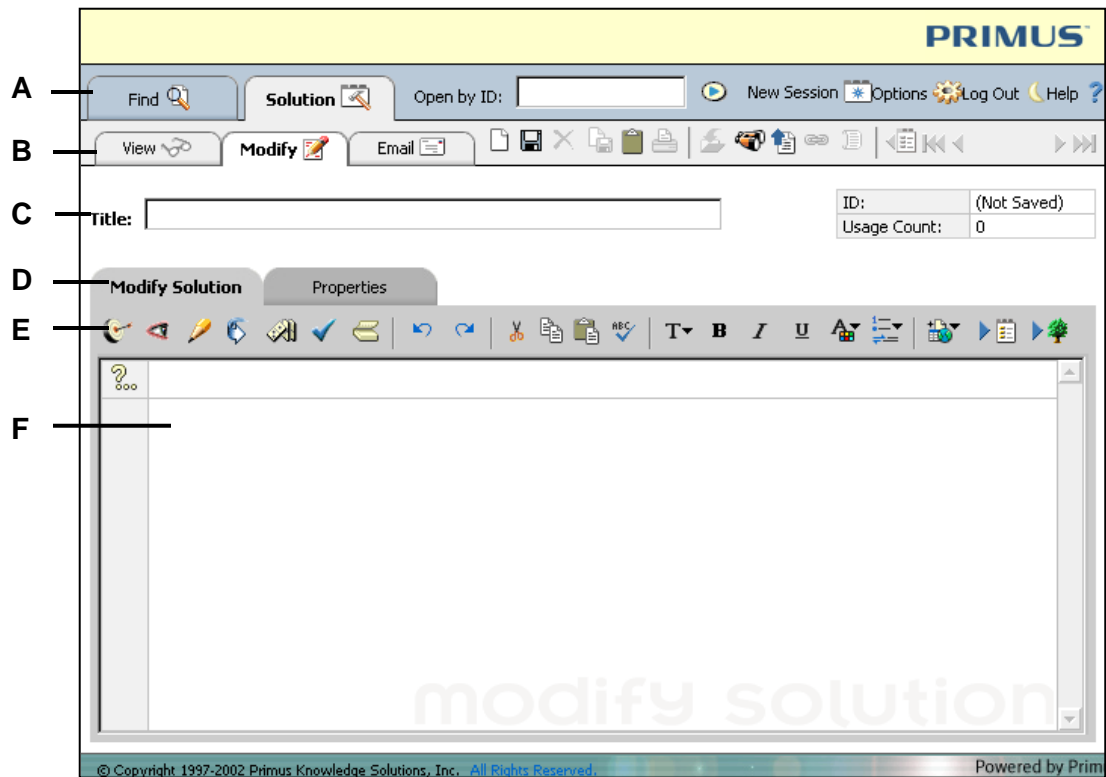
- Create solutions (Solution Window)

It's essential that you learn to navigate the toolbars, tabs, fields, and windows that help you perform these functions.

Find Window

A iView's Main Navigation Bar

B Find Toolbar

C Find Tabs

D My Problem Search Pane

E Results Pane

Solution Window

A

B

C

D

E

F

A iView's Main Navigation Bar

B Solution Toolbar and Tabs

C Solution Title Field

D Modify Solution Tabs

E Solution Toolbar

F Modify Solution Pane

Setting Up Primus Options

You can set up your own options to customize Primus or use the preset defaults (shown below). As you learn about searching for and creating solutions in upcoming lessons, you will gain a better understanding of how these options affect Primus functionality.

Look for this icon in upcoming lessons for hints on setting these options.

You can view
User
Information on
this tab…

You can
change your
Primus
password
here…

You can
customize
Primus
here…

IMPORTANT To avoid negatively impacting your search results, leave the match strength settings, in the Results Options section (at the bottom), at their default values.

Getting Help with Primus

Although Primus is easy to use, with an intuitive user interface, if you have questions about using its features, there are several places to get help:

- Online Help is available from the Help button on the main toolbar.

- Primus team members.

Activity – Explore the User Interface

Instructions:

1. Log in to Primus.

2. On the iView Navigation bar (blue):

    - Click the **Find** tab and explore the buttons and tabs of the Find window!

    - Click the **Solution** tab and explore the buttons and tabs of the Solution window!

    - Click **Options** and explore the ways you can customize Primus there.

    - Click **Help** and browse the help topics available to you.

    NOTE Although not all of the features will make sense to you at this point, most of them are covered in upcoming lessons.

Activity – In Review…

Instructions:

Write the answers to these questions, in the spaces provided, and then review them with the class.

1. Why is it important to log in with your own user name and password?

2. What are the two main Primus windows you'll be working in?

3. What are the Options for?

4. What two sources of help for using Primus are available to you?

Key Point Summary

Following are the most important points to remember from this lesson:

- It's important to log in to Primus with your unique user name and password; your login is directly related to any Options you set and solutions you create.

- The Primus user interface is easy to work with and intuitive; learning your way around it is essential!

- The Options window in Primus contains settings that enable you to change your password as well as customize features.

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Lesson Three: Searching for Solutions

Lesson Introduction

This lesson describes workflows, key concepts, and procedures for using Primus to search for customer solutions.

Lesson Goals

At the end of this lesson, you will be able to:

- Describe the four main Primus workflows for searching.

- Describe the seven Role Statements Primus uses.

- Develop search phrases using Role Statements.

- Perform four types of searches using Primus.

- Describe the two types of search results you can view and how to work with them.

- Explain how to troubleshoot searches.

Why Is This Lesson Important?

This lesson is important because it explains how to search Primus, which is at the core of making it a tool for enhancing customer service at T-Mobile.

Terms and Acronyms

TERM/ACRONYM	MEANING
Query	Another term for search, usually involving predefined constraints or query operators.
Role Statement	A way of categorizing a customer problem, both for searching Primus and creating new solutions.

Phrasing Your Searches

Before you can begin searching for customer solutions, you need to understand the Primus model for phrasing your searches using the *Role Statements*.

- Goals

- Symptoms

- Facts

- Changes

- Causes

- Fixes

- Notes

All Role Statements should have the following elements in common:

- Use natural language (instead of a query language).

- Are specific and provide context (such as facts and circumstances).

- Use the vocabulary of the customer, not technical jargon.

What's a Role Statement?

A Role Statement is simply a way of categorizing a customer problem, both for searching Primus and creating new solutions. An easy way to define Role Statements is to ask yourself these questions:

What are the **goals** the customer is trying to accomplish? Examples:

– How to set up e-mail

– How to configure Caller ID

What **symptoms** are indicating a problem with a product or service? Examples:

– SMS envelope blinking

– Error: "Message ALB52"

– Dropped calls

What are the **facts** of the customer's product or service? Examples:

– Nokia 3390

– Within coverage area

NOTE Do not use temporary facts, such as locations or dates.

What **changes** in the customer's product or service have occurred lately? Examples:

– Changed MSISDN

– Account was suspended

What **caused** the problem (mostly used when creating solutions)? Examples:

– IMSI was not provisioned correctly

– Firmware issue with the handset

NOTE A cause is a known, matter-of-fact issue, not speculation!

What **fixes** might I suggest for this problem (mostly used when creating solutions)? Examples:

– Reprovision IMSI in SMR

– Cancel location and power cycle

What **notes** do I need to make about this problem (not searchable, mostly used when creating solutions)? Examples:

– Do not file a trouble ticket for this issue

Activity – Identifying Types of Role Statements

Instructions:

Next to each of the search statements listed, write the type of Role Statement it represents: goal, symptom, fact, change, or cause.

Search Phrasing	Role Statement Type?
Need to turn off call forwarding	
Nokia 9290	
Blinking yellow light	
Recently converted to postpaid	
LCD is distorted	
Changed SIM password	
Got a new handset	
Screen is frozen	
Pocket PC	
Dropped device on floor	
Faxmail	
How to insert a SIM	
Error: "The subscriber you have dialed…"	
Good coverage area	

Activity – Write Your Own Role Statements!

Instructions:

Create Role Statements out of these customer problems.

Customer says….	Fill in Role Statements…
"I keep trying to call my voicemail, but it keeps telling me I need a password. Can you reset it for me?"	🎯 _____ 🎯 _____ 👁 _____
"I've always been able to call my sister at the number 123-6789, but now I can't get through. What's wrong with my phone?"	🎯 _____ 👁 _____ ✒ _____
"I'm able to make calls just fine, but whenever someone tries to call me, they get a "56" error. I just got this new number a few minutes ago. What's going on?"	🎯 _____ 👁 _____ 👉 _____
"My phone's display will indicate that I have new voicemail, but when I call to listen to it, the recording says I have no new messages. Is my voicemail broken?"	🎯 _____ ✒ _____ 👁 _____

Searching Primus
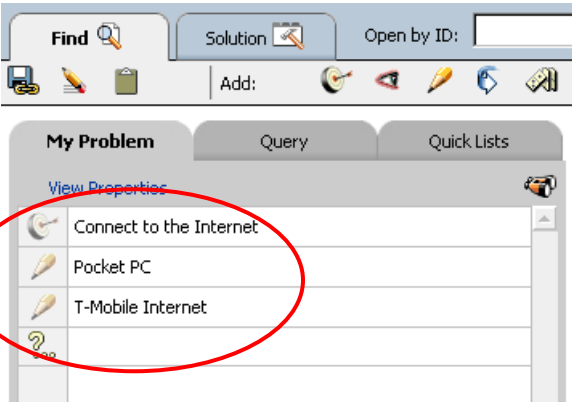
There are four ways to search Primus:
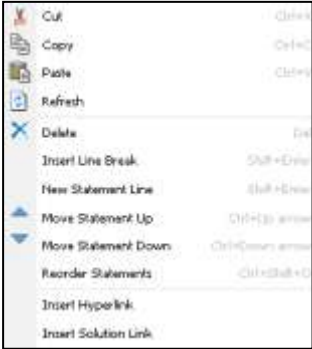
- **By Problem** – The most common way of searching, use the My Problem tab to capture the details of a customer's problem during a call and quickly locate a solution.

- **By Query** – A fast way to look up a group of specific solutions, use the Query tab to search Primus by author, date, type, and so on.

- **Using Quick Lists** – A convenient way of finding commonly-used solutions, use the Quick Lists tab to view your "favorites" and "hot solutions" of the day, week, month, or year.

- **By Solution ID** – A quick and easy way to look up one specific solution, use the "Open by ID" field to search for a solution with a particular ID number.
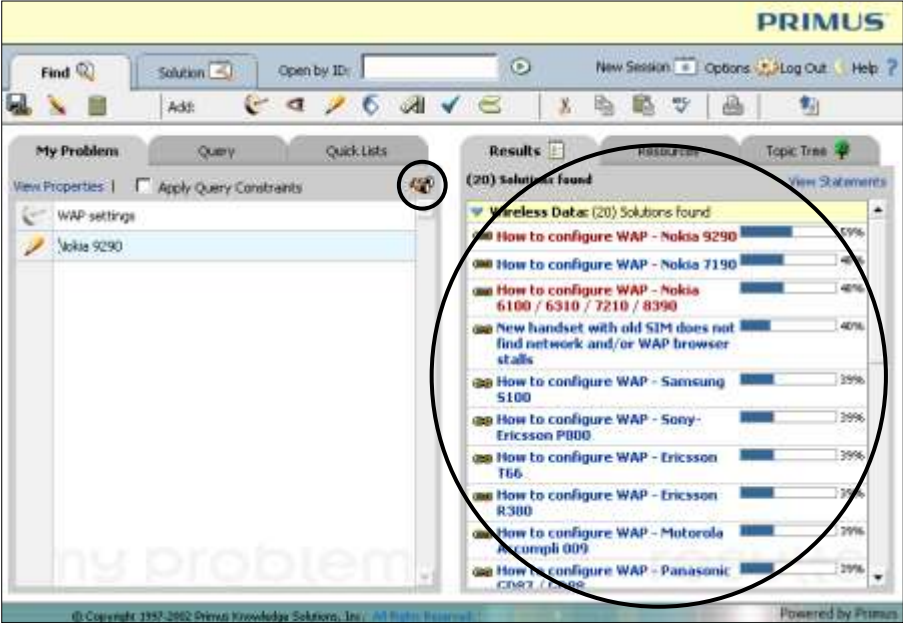
Step Action – Searching by Problem

Searching by problem, using the My Problem tab, enables you to use Role Statements to describe the issue the customer is having.

Step	Action: Searching by Problem
1	On the **My Problem** pane of the **Find** window, in the undefined search field 📖 , type the customer's problem or question. Break down the information into specific phrases.
2	Click 📖 and, from the drop-down list, choose a **Role Statement** type for the phrase (**goal, symptom, fact…**). **HINT** Writing search phrases in the form of Role Statements increases your chances of finding the most targeted solutions.
3	To open another undefined search field, click below the phrase you just typed, or press **Shift + Enter**. – OR – To add a defined Role Statement to your search, on the toolbar, click one of the Role Statement icons. You can set different actions for your Enter key in Options. **HINT** You will most likely only need to create two or three Role Statements for a problem.

Step	Action: Searching by Problem
4	To add more Role Statements to your search, repeat steps 1 – 3. **HINT** You can add multiple Goals, Symptoms, and Facts to describe the problem and to increase your search results.
5	To check from matching Role Statements that already exist in Primus, click the Role Statement, and from the menu that opens, click **Matching Statements**. If matching statements are found and listed, click the body of a statement to replace the one you entered OR click Add to add several statements (and then Done when you're finished).
6	**Optional:** To access menu commands such as Cut, Copy, Paste, Delete, Move Statement Up, and so on, right-click the Role Statement you want to work with.
7	**Optional:** To exclude information that's specifically not true for your search, create a Role Statement you want to exclude, click it, and then, from the menu that opens, click **Negate**. **NOTE** Negating Role Statements can improve your search results.
8	To spell check your Role Statement phrasing, click . **NOTE** Spell checking your search is important because misspellings can limit your search results.

Step	Action: Searching by Problem
9	To start the search, click 🐿 or press **Enter**. You can set different actions for your Enter key in Options. The results of your search are displayed under the Results tab in the adjacent pane. **NOTE** How to work with these results is explained in upcoming sections of this lesson.
10	To clear the search (to start another one), click ✏️ . **NOTE** When you end a call and move on to a new customer, you should click New Session New Session ✳ to clear the problem and start fresh.

Activity – Search by Problem

Instructions:

- Using the preceding step-action, search for several customer problems you're familiar with.

- Explore Primus Options and take note of how they impact your search.

- Work through some of the optional steps!

NOTE You can explore the solutions you find; however, working with solutions is covered later in this lesson.

Step Action – Searching by Query

Searching by Query, using the Query tab, enables you to find groups of similar solutions using preset "query restraints." For example, you could find solutions created by a particular author, by date, or by type.

Step	Action: Search by Query
1	On the **Query** tab, next to the type of query you want to run (by type, make, author, and so on) click ▶ .
2	From the list box, select either: • **Include** – tells Primus to include the constraints you choose • **Exclude** – tells Primus to exclude the constraints you choose
3	From the listed constraints, click one or several for your search. As you click each one, a checkmark appears next to it.

Creating Solutions v1.0

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Step	Action: Search by Query
4	Click **OK**. **NOTE** Repeat steps 1 – 3 if you want to include or exclude additional constraints.
5	**Optional:** To save the query (so you can run it again), click **Save Options…**, type a name for it, and then click **OK**.
6	To start the search, click . The results of your search appear under the Results tab in the adjacent window. **NOTE** How to work with these results is explained in upcoming sections of this lesson.
7	To clear the search (to start another one), click . **NOTE** When you end a call and move on to a new customer, you should click New Session to clear the problem and start fresh.

Activity – Search by Query

Instructions:

Using the preceding step-action, search for customer problems by *type*.

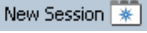> **NOTE** You can explore the solutions you find; however, working with solutions is covered later in this lesson.

Step Action – Searching by Quick Lists

Searching by Quick List, using the Quick Lists tab, enables you to quickly view favorites you've saved as well as solutions that have be recently used (by your fellow call center representatives) to solve customer problems.

Step	Action: Search By Hot Solution
1	On the **Quick Lists** tab, click **Hot Solutions**.
2	From the list boxes: • Select the number of solutions you want to view (10 – 100). • Select the time period during which the solutions were used (from the last day, week, month, or year).
3	**Optional:** If you've selected query constraints on the Query tab, check **Apply Query Constraints** to use them in the Hot Solutions search.

Step	Action: Search By Hot Solution
4	To start the search, click . The results of your search appear under the **Results** tab in the adjacent window. **NOTE** How to work with these results is explained in upcoming sections of this lesson.
5	To clear the search (to start another one), click . **NOTE** When you end a call and move on to a new customer, you should click New Session to clear the problem and start fresh.

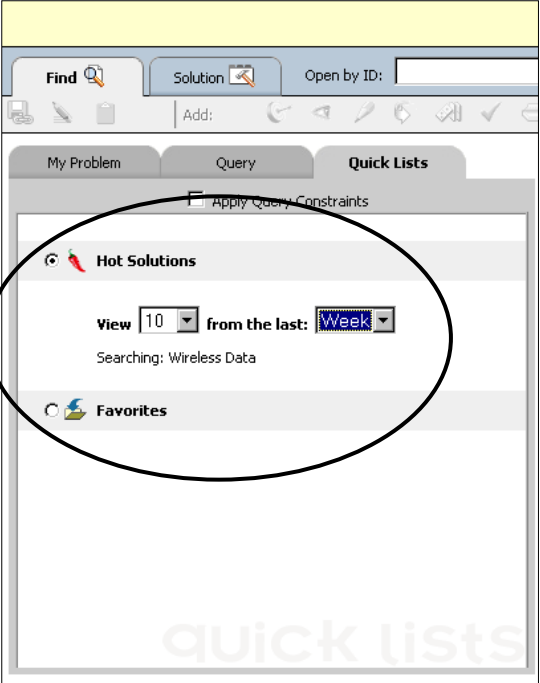| Step	Action: Search By Favorites
1	On the Quick Lists tab, click **Favorites**. Your favorites appear under the **Results** tab in the adjacent window. **NOTE:** How to add solutions to your Favorites list is explained in upcoming sections of this lesson.
2	To clear the search (to start another one), click . **NOTE** When you end a call and move on to a new customer, you should click New Session to clear the problem and start fresh.

Activity – Search by Quick Lists

Instructions:

Using the preceding step-action, take a look at the Hot Solutions in Primus. You won't be able to view Favorites until you understand how they're added (later in this lesson).
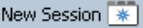
> **NOTE** You can explore the solutions you find; however, working with solutions is covered later in this lesson.

Step Action – Searching by Solution ID

Searching by solution ID is a way of looking up a known solution to a problem. All solution ID numbers begin with "CCKB" for "customer care knowledgebase."

Step	Action: Search by Solution ID
1	On the main navigation bar, in the **Open by ID** field, type a known solution ID number and then click ⊙ . **NOTE** Solution ID numbers are displayed in a properties box when a solution is opened (in the Solution window).

Activity – Search by Solution ID

Instructions:

Using the preceding step-action, look up several solutions by ID (these will be provided by the instructor).

NOTE You can explore the solutions you find; however, working with solutions is covered later in this lesson.

Working with Search Results

How your search results are displayed in the Results window depends on the following (described in the step-action that follows):

- Options set up for filtering

- View Statements/Hide Statements

- Resources tab

Linking Results

If a Primus solution is helpful in solving a customer's problem, you should indicate its usefulness by clicking the link button . Linking a solution is one of the most important steps you can take to make Primus a successful tool. *Make it a habit to link useful solutions before you start a new session!*

NOTE Each solution has a "usage count" property associated with it, which indicates how often it's linked. Linking a solution every time you use it to solve a customer problem results in more targeted search results and higher quality solutions.
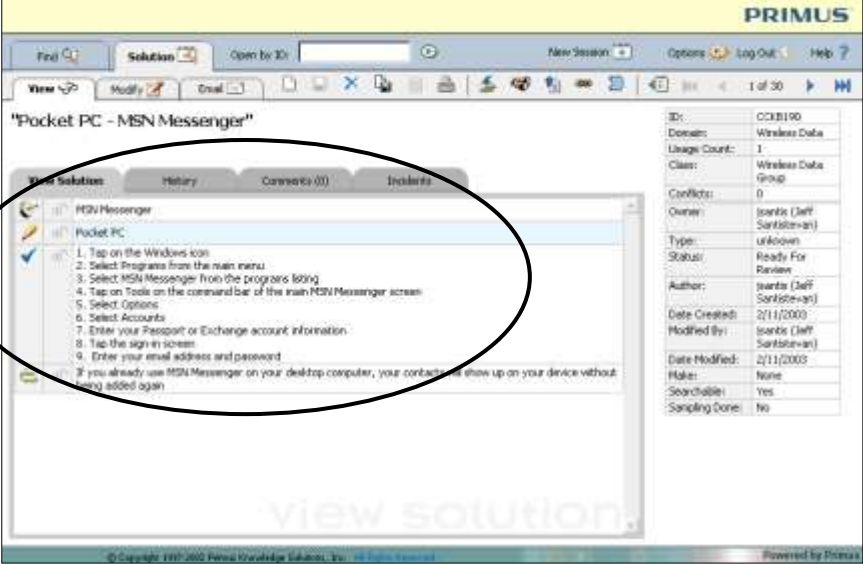
Adding Search Results to Favorites

You can add solutions to your own personal favorites list (associated with your login). This gives you quick access to the customer issues you work with the most!

Step Action – Working with Search Results

Step	Action: Working with Search Results
1	In the **Results** pane, you can work with the listed solutions in the following ways: • Right-click any Role Statement to change your search filtering Options (or change these in the Options window). • On the Results tab, you can choose to either view or hide the Role Statements associated with a solution (click View Statements or Hide Statements). With the Role Statements visible, you can click them to move them over to the My Problem pane to refine your search.

Step	Action: Working with Search Results
2	In the **Results** pane, click a solution from the list. **NOTE** You may need to use the scroll bar to view the entire list.
3	If a solution solves a customer's problem, click [icon] (to link it). You can also link a solution directly from the Results tab in the Find Window. – OR – If a solution doesn't solve a customer's problem, click [icon] to return to the search results list (to view other solutions or troubleshoot the search).
4	**Optional:** To e-mail a solution to another representative, click the **Email** tab, enter the recipient address and any comments, and then click [Send].
5	**Optional:** To add the solution to your Favorites list, click [icon].
6	To clear the search (to start another one), click [icon]. **NOTE** When you end a call and move on to a new customer, you should click New Session [New Session icon] to clear the problem and start fresh. If a solution solves a customer's problem, remember to click [icon] (to link it).

Activity – Explore Search Results

Instructions:

- Using the preceding step-action, explore several Primus solutions.

- Explore Primus Options and take note of how they impact your results.

- Work through some of the optional steps and don't forget to link the solution!

NOTE Your instructor will give you Role Statements that will produce search results for both types of solutions.

Troubleshooting Searches

When your search doesn't provide the solution you're looking for or returns no results at all, you should *always* perform another search, considering whether you:

- Have misspelled words (or didn't use spell check).

- Used words not recognized by Primus (overly technical, jargon, or slang).

- Used overly complex phrasing (too many ideas or too long).

- Used Statement Roles incorrectly.

IMPORTANT If you change your search in any way, for example change spellings, assign new Role Statements, or select a matching statement, you must run the search again (by clicking 🖱). However, you can set your Options to automatically check spelling as well as to automatically update your search when something changes.

Primus Call Handling Skills

Following are key call handling skills for using Primus to troubleshoot customer problems.

- **Listen and be curious** – Really listen to what the person is saying and approach problems with enthusiasm and curiosity.

- **Restate the problem** – The first step in solving a problem is restating it accurately, using the language of the customer.

- **Break down the problem's key issues** – Focus your search using Role Statements!

- **Search for known solutions** – Is there a known fix for this problem in Primus?

- **Work through the most closely related solution** – Take the customer step by step through the solution you think might solve the problem. Speak slowly and make sure the customer is following the steps at the same pace.

- **Verify the solution** – Verify that the customer's problem has been resolved; for example, make sure the device can connect, send an e-mail, and so on. Once you verify a solution, "link it" in Primus.

- **Troubleshoot and keep an open mind** – If the first solution doesn't fix the problem, there may be more than one possible solution in Primus. Search again!

- **Keep trying** – If there are no Primus solutions available to solve the customer problem, try other resources.

- **Share your knowledge** – If you find a solution elsewhere, remember to enter it in Primus so that it will be available the next time the issue arises (covered in the next lesson).

Activity – Call Handling Role Play

Instructions:

Now that you've learned how you'll be using Primus to search for customer solutions, look back over the call handling skills and prepare to role play as both a customer and customer service representative.

- **Customer:** Using Primus, look up a customer problem that's of particular interest to you and use it to play the role of the customer.

- **Customer Service Representative:** Using Primus, search for the solution using the My Problem tab. Try to use as many of the call handling skills as possible.

NOTE Your instructor may choose to conduct this activity as a class or in groups so that others can benefit from observing the role plays.

Activity – In Review…

Instructions:

Write the answers to these questions, in the spaces provided, and then review them with the class.

1. What is the purpose of Role Statements?

2. What Role Statement types are available?

3. What can you do on the My Problem tab?

4. What can you do on the Query tab?

5. What kinds of solutions can you view from the Quick Lists tab?

In Review…. continued

6. What's the purpose of negating Role Statements in a search?

7. How do the filter settings in Options affect your search?

8. When is it appropriate to click the link button and why is it important?

9. If you don't get the search results you're looking for, what are some troubleshooting steps you can take?

10. What should you do before beginning a new search?

Key Point Summary

Following are the most important points to remember from this lesson:

- It's important that you learn how to write Role Statements because they are used both to describe customer problems and create solutions.

- There are four types of searches Primus can perform: by Problem, by Query, by Quick List, and by Solution ID. Most of the time, you will probably be searching by Problem; however, as you work with Primus, you will find all of these search types useful.

- If at first you don't find the problem you're looking for in Primus, try, try again! Knowing how to troubleshoot Primus searches—checking spelling, changing Role Statements, rephrasing—will help you pinpoint solutions quicker and more accurately.

- If you find a Primus solution that resolves a customer problem, you should *always* link it (using the link icon)!

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Lesson Four: Creating Solutions

Lesson Introduction

This lesson describes processes, best practices, and procedures for using Primus to create customer solutions.

Lesson Goals

At the end of this lesson, you will be able to:

- Describe the process newly created solutions go through.

- Explain the qualities of a "good" solution.

- Create new Primus solutions to customer problems.

- Modify existing Primus solutions (that are inaccurate/incomplete) to customer problems.

Why Is This Lesson Important?

This lesson is important because it explains how to create and modify solutions in Primus, which is at the core of making it a tool for enhancing customer service at T-Mobile.

Creating and Modifying Solutions

Primus contains many solutions to help you resolve customer calls; however, solutions will continue to be added and modified over time. You play a large part in making Primus a useful tool for T-Mobile!

- If you search for a solution and don't find one…*create one*!

- If you find a solution that is incomplete or incorrect…*modify it*!

- If a new product or service is introduced and you receive training…*share your knowledge in Primus*!

All customer service representatives have the ability to add and modify solutions in Primus. Once a solution is added or modified, it is sent to a review team. Most of the time, new or modified solutions should become available in Primus within 24 hours. When you create a solution, your name is displayed as the author in its Properties. This helps the review team if they need to contact you for clarification and also shows that you are contributing your knowledge to Primus.

After your solutions are reviewed and published in Primus, you will probably see slight changes to them; for example, you may see updated terminology, modified grammar, and reassigned Role Statements. The review process is designed to free you from having to focus on these things as you're creating solutions. If you concentrate on *technical accuracy*, NOT on grammar and editorial style, you will find working with Primus rewarding and fun.

Components of a Good Solution

Although each solution goes through a review, *a good solution starts with YOU*! Modeling your fixes after ones already in Primus is a great way to ensure you're on the right track.

When you're creating or modifying a solution, focus on the following components.

Descriptive Title

Does it include the problem *and* related product or service? A title that only says "Treo Blazer" is not as descriptive as "Can the Treo's Blazer browser view WAP sites?" Although titles are not searchable, they are important because of their prominence in the search results list.

Essential Role Statements

Are there enough Role Statements to describe the customer problem and make it searchable? A solution must have at least one Role Statement (or an error message will appear when you try to save it), but two or three are recommended. Goals, symptoms, and facts are the most essential Role Statements to include in your solution.

Accurate and Specific Fix

Is the fix technically accurate? Does it list specific and concrete steps, such as "On the Connections tab, tap Internet"? Remember, other representatives will be using your solutions during customer calls and are counting on them to be accurate and easy to follow. However, there are some important guidelines to keep in mind, also:
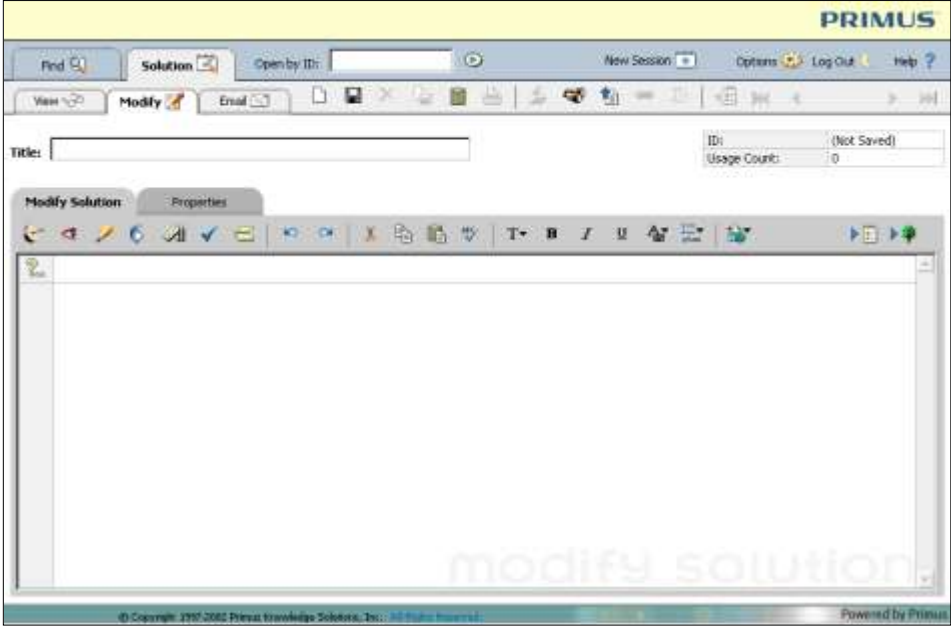
- Do not cut and paste content from public Web sites, user manuals, or other sources. This goes against copyright laws!

- Do not duplicate information found on StreamLine; link to it, instead.

- If the customer's problem is one that you know should be transferred, create a solution that contains "transfer" as the fix.

Step Action – Creating or Modifying a Solution

Before you create a new solution to a customer problem, you should *always* search Primus to see if one already exists. If you find a solution that is incomplete or incorrect, you can modify it. Both new and modified solutions are put through the same review process.

Step	Action: Creating or Modifying a Solution
1	Once you've searched for a solution (from the **Find** window) and determined that you need to create a new one, click the **Solution** tab. - OR - If you find a solution, but need to modify it, click the solution from the search results list. The **Modify** window appears (on the **Solution** tab).

Step	Action: Creating or Modifying a Solution
2	In the **Title** field, type a descriptive title for the solution (or modify an existing one). **NOTE** Titles are not searchable; however, they should be very descriptive and contain the problem and the product/service related to the problem; for example, "Is the Pocket PC MMS capable?"
3	Add (or modify) Role Statements describing the problem; for example, goals, symptoms, facts, causes (same as adding Role Statements for a search). **NOTE** It's not important that you put these in any particular order; Primus reorders them when you save the solution.
4	Using the Fix Role Statement, write (or modify) the solution to the problem, using these guidelines: • Do not cut and paste content from public Web sites, user manuals, or other sources. This goes against copyright laws! • Do not duplicate information found on StreamLine; link to it, instead. • If the customer's problem is one that you know should be transferred, create a solution that contains "transfer" as the fix. Fixes often require that you enter more than one line of text. You can choose the way you enter line breaks (Ctrl + Enter or Shift + Enter) in Options.

Step	Action: Creating or Modifying a Solution
5	**Optional:** To add a solution link to a Role Statement (usually to a fix), click 🌐 and then type in either the Web address or Solution ID.
6	**Optional:** To format your Role Statements, use any of the formatting buttons in the toolbar T▾ **B** *I* U A▾ ▤▾ .
7	**Optional:** To use the eServer Clipboard to create solutions, on the toolbar, click 📋 , type your text in the window, and then click **Place**. The eServer Clipboard can place individual Role Statements into your solution, if you type them as follows: **Goal:** Send e-mail **Symptom:** Connection icon broken **Fact:** Nokia 9290
8	Click 💾 to save the solution and send it to review. If you didn't use at least one Role Statement, an error message is displayed. **NOTE** Remember, when you create a solution, your name appears as the author in the solution Properties.

Activity – Create and Modify Solutions

Instructions:

- Using the preceding step-action, and the solutions you've brought to training with you, create several new solutions. Remember to search for a solution before you create a new one!

- Explore Primus Options and take note of how they impact creating solutions.

- Work through some of the optional steps.

IMPORTANT If you decide to modify an existing solution, check with your instructor first. You may be asked to work only with specific solutions that are known to be incorrect or incomplete.

Activity – In Review…

Instructions:

Write the answers to these questions, in the spaces provided, and then review them with the class.

1. What should you do before creating a *new* solution?

2. For what reasons would you *modify* a solution?

3. What are the components of a good solution?

4. List three important guidelines for creating fix statements.

5. Although titles are not searchable, explain why they are important.

6. What two types of links can you add to a solution?

7. What happens to your solution after you save it?

Key Point Summary

Following are the most important points to remember from this lesson:

- Once you create or modify a solution in Primus, it goes through a content review process before it becomes available for searching and viewing.

- Good solutions contain the following components:

  - A descriptive title, containing both the problem and the product/service.

  - Role statements that are essential to searching.

  - A specific and accurate fix, modeled after other solutions.

- You can create or modify solutions in Primus using the Solution window and its toolbar buttons.

  - Do not cut and paste content from public Web sites, user manuals, or other sources. This goes against copyright laws!

  - You can link to other solutions (by ID) and also add Web addresses to your solutions (by URL).

  - If the customer's problem is one that you know should be transferred, you can create a solution that contains "transfer" as the fix.

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